

**CBO Mentor Project
Mentor and Participant
Guide to Discussion Topics and Assignments
2009-10**

draft

In addition to the various class assignments you **must come to class prepared** to participate in a discussion about a variety of topics. You need to have a conversation with your mentor prior to each class to discuss the topics shown below. Your job is to gather input and be prepared to **speak for two minutes** in class on each question. You may or may not be called upon to speak at each class BUT you must always be prepared. The goal is to create comfortable **public speakers** who also learn the skill of **speaking succinctly in two minutes**.

Before each class, we will assign an interview question for you to research. You are required to develop an answer, review that answer with your mentor. You then need to be prepared to answer the interview question in a peer to peer setting or in front of the entire class. **The goal is to learn more about the assigned topic, learn how to answer an interview question with sensitivity about language and content, and gain more comfort as a public speaker.**

You will also be required to WRITE. You will be given direction on the written assignment. Typically we will require a one page written summary of about 200 words to 300 words. The goal is to create **strong written communication skills**.

For research questions that say “your district”, you may use your own district, your mentor’s district or a district mutually agreed upon by you and your mentor. If a topic is outside of your mentor’s experience, the mentor and participant may find another source that can provide insight or information.

This schedule of topics and assignments may be revised during the year. After each class you will receive a **Monday Morning letter** that recaps the weekend and provides an update on all the assignments. In addition, we provide detailed instructions for assignments with written class materials. AND, these are all posted on FCMAAT website.

Session 1 (April)

INTRODUCTION. OVERVIEW. COMMUNICATION.

APRIL Assignments

BEFORE CLASS:

Do the on-line Strengths Assessment

Read the book provided, “**Now, Discover Your Strengths**”.

WRITTEN Assignments

Prepare a one page (200 to 300 words) written summary document that speaks to student achievement in your district. We will have professional writers critique your work.

Session 2 (May)

SCHOOL FINANCE. MAY REVISE. LEADERSHIP. BUDGET PRESENTATION

MAY MENTOR DISCUSSION TOPICS

Discuss with your mentor what they believe is the role of a CBO and the qualities they feel are critical to be successful. Discuss your strengths and the strengths of your mentor. 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.

Discuss student achievement and how they believe a CBO plays a role with the district leadership team in achieving student success. Discuss with them your assignment to talk for two minutes about student achievement.

What is your district revenue limit? Bring to the class a copy of your district revenue limit calculation as presented in the 2nd interim report. Discuss with your mentor where your revenue limit is in relationship to the state wide average for your type of district. Do you know why it is above or below statewide average?

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.

MAY Written Assignment

Prepare a 200 – 300 word summary that describes your district revenue limit funding. Include whether you are above or below the statewide average (and why). Include the percentages of state aid and property tax. **Describe it as though you were including the description in a budget document.**

MAY Assignments

1. Come prepared to talk (TWO MINUTES) about student achievement in your district.
2. Review the Clovis Unified School District Budget On-line at :
<http://www.cusd.com/business/budget.htm>
 - “Do not Print”
 - You have an acting part! Review with that in mind. Acting parts below.
 - Bill McGuire will do a budget presentation on Friday May 9
 - You will be observing his presentation and asking him questions.
3. Attend a board meeting in June where a budget is being presented.
(Your district, your mentor’s district, or another district of your choice).

Session 3 (June)

FISCAL OVERSIGHT (AB1200). LEADERSHIP. LEGAL, ACCOUNTING BASICS.

JUNE MENTOR DISCUSSION TOPICS

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

Talk to your mentor about legal contracts and the most important lessons they have learned over the years relative to contracts.

Interview Question: We understand the need for a reserve for economic uncertainty. However, these are definitely times of great economic uncertainty. What are the conditions whereby use of reserves to balance the budget is acceptable?

JUNE WRITTEN Assignments

Prepare a 200 – 300 word summary that describes Class Size Reduction Funding in 2009-10. **Describe it as though you were including the description in a budget document.**

June Assignments

1. User Friendly BUDGET. You received your CD. Start data collection now. Don't wait until the last minute. To be submitted by the October meeting.
2. 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)
3. Leadership workbook assignment
Each group member will read the Laws assigned and complete the following:
 - The Observe Section
 - The Evaluate Section
 - The Discuss Section

- The Take Action Section

Each Team will schedule and conduct a conference call to discuss the team member's individual results and review the Laws in general as a team. Free Conference Calls – cost of long distance <http://www.freeconference.com>

Each Team will present the results of their review of their assigned Laws . The 21 Irrefutable Laws of Leadership will be Jigsawed by the teams for the class as a whole, however you ARE REQUIRED TO READ the entire 21 Laws and can expect to be quizzed.

4. Attend a JPA meeting (workers compensation/property & liability/health and welfare) – not due until January.

Session 4 (August) Financial Reporting/Medical Benefits/Ethics

AUGUST MENTOR DISCUSSION TOPICS

Talk to you mentor about how they analyze a financial report that comes to them from their Director of Fiscal Services for final review and approval. What tools do they use to analyze the data? What are the critical elements they look for when they review?

Has your audit started? Who is the auditor? Talk to your mentor about the role of the auditor and what attributes they feel are important in the selection of an auditor. Bring a copy of your audit report (2006-07 audit) to this session and discuss with your mentor the findings and recommendations.

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.

Interview question: Ask your mentor, what is their favorite interview question? Respond to the question as though you were in an interview. Have them critique your response.

August WRITTEN Assignments

Prepare a 200 – 300 word summary that describes categorical flexibility funding in 2009-10. **Describe it as though you were including the description in a budget document.**

AUGUST Assignments

1. User Friendly BUDGET. You received your CD. Start data collection now. Don't wait until the last minute. To be submitted by the October meeting.
2. 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!

3. Financial Assignment.

What is the STORY can you derive from the financial information.

FIVE working groups

- Each group provided a complete SACS document for a district
- Five different district financial reports
- Each district is unique and specifically chosen for this exercise
- Group performs an analysis of the fiscal status of the district
- Guidelines for you to use to analyze the data (steps 1 through 9)
- Create a summary document that TELLS A STORY for your presentation
- Presentation is typically PowerPoint
- Five minute presentation
- No specific guidelines – use your group imagination
- There is no right or wrong presentation – your job is to communicate to the group THE STORY you have learned about this district from a review of their financial information. Please try to disguise your accounting background when you prepare the story.

Session 5 (September)
BUDGET DEVELOPMENT

SEPTEMBER MENTOR DISCUSSION TOPICS

What is your mentor's philosophy on budget presentations? Discuss with your mentor their tips for a successful budget presentation. What advice would they give you regarding budget documents?

Ask your mentor about to give you an example when they were faced with a difficult ethical dilemma in their role as a CBO.

Interview question: It is May and you are reviewing the district books to avoid year end surprises. What three accounts would you review and why? Discuss how to avoid year end surprises.

September WRITTEN Assignments

Prepare a summary of the interview question above. What three accounts would you review and why? (at least 300 words – may be more)

SEPTEMBER Assignments

- 1. Refresh yourself on your strengths. 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 actual (2008-09) compared to the last estimate. 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:
 - 2009-10 Budget to board – find 2008-09 estimated actuals from this document
 - 2008-09 Actuals (September 15, 2009 document)

If you do not have a district, request your mentor's assistance in finding a suitable district for analysis. Finished assignment due at the October class (submit electronically).

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 at the October class. Bring one copy to the class. 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 January.
5. Attend a Collective Bargaining session (not due until November)
6. Early Birds – get working on your resume (due in January)

Session 6 (October)

Position Control, Facilities

OCTOBER MENTOR DISCUSSION TOPICS

Be prepared to describe how position control works in your district. Discuss this with your mentor and talk about what are the elements critical to position control and what are the barriers to successful implementation.

Ask your mentor about a time in their career where they had a strong working relationship between HR and Business?

What are the most pressing issues for your district relative to facilities? What are the barriers to your construction program? Talk to your mentor about what they view as the most critical role of a CBO relative to facilities?

Interview Question:

Our district is planning to have a bond election in order to modernize and expand existing facilities. As the CBO, with oversight of the facilities and a member of the district leadership team, describe the elements we should be considering as we start the bond election planning process. What are the key things we should be doing?

NO WRITTEN Assignments

OCTOBER Assignments

End of Year Variance analysis due – see September assignment for details.

User Friendly BUDGET due.. CD provided. See September assignment for details.

November topics

Food Service Presentations, Transportation/Enrollment

NOVEMBER MENTOR DISCUSSION TOPICS

How does your district determine the number of students for the coming year? Who is responsible for making that determination? What is the district process for enrollment projections for staffing?

Talk to your mentor about their experiences relative to transportation and the challenges they faced as a CBO with regards to transportation.

What is the financial status of your cafeteria operations? Your Mentors? Profit center? Break even. Losing? Discuss with your mentor the challenges of food service operation.

Interview Question:

Describe your experience in the area of collective bargaining. Coming into our district, what would you do to prepare for your first negotiation session with CTA and CSEA?

NO WRITTEN Assignments

NOVEMBER Assignments

1. Food Service Presentation (see document handed out at the session)
Food Service presentations are done at this session. Teams have been formed and direction provided to the teams. These presentations will focus on development of presentation materials, public speaking skills, and team dynamics. You each have a responsibility to make sure your team is successful. PRACTICE, PRACTICE, PRACTICE.
Bring 2 hard copies of your presentation. We will provide the laptop, projector and we will be filming your team.
2. Attend a Collective Bargaining session.
3. Early Birds – get working on your resume (due in January)

Session 8 (January) GOVERNORS'S BUDGET UPDATE, SPECIAL EDUCATION/WORKERS COMPENSATION/PROPERTY & LIABILITY

JANUARY MENTOR DISCUSSION TOPICS

What is the workers compensation rate and modification factor for your district?
What is your annual premium? Are you self insured? Member of a JPA? Other?
What are the challenges facing your district in the area of workers compensation?

How is your district's property and liability insurance provided? What is the annual premium? Are you self insured? Member of a JPA? Other?. What are the challenges facing your district in the area of insurance?

Talk to your mentor about the challenges involved in special education, both programmatically and financially. As you focus on the general fund contribution to special education, what is their advice about areas where you should pay attention?

Talk to your mentor about your Food Service presentation and your mid year. Make sure you share your self assessment and the feedback provided to you by our team. Solicit their advice about how you can improve your public speaking skills.

Interview question: Our food service program is not self supporting. If you were hired as the CBO for our district, what steps would you take to move the program to fully self supporting?

WRITTEN Assignments

Prepare a 200 – 300 word summary that describes special education funding in 2009-10. **Describe it as though you were including the description in a budget document.**

JANUARY Assignments

Read Good to Great (handed out at lunch in November.

You will receive a Zoomerang survey to record your thoughts on :

- Level 5 leadership
- Getting the right people on the bus
- Confronting the brutal facts
- The hedgehog concept
- Culture of discipline
- Turning the flywheel

2. Budget Crisis Response Project (details provided in November)

End product:

Summary document (MS Word)

Submit electronically (January class).

- Overview of political situation (pick a point in time- any time)
- Scope of reductions for your sample district (2008-09, 2009-10)
- District talking points relative to the budget in 2008-09, 2009-10
- District communication strategy
- District budget reduction process with timelines

Report out verbally to the group in January about the exercise .

Document should be between 3 to 5 pages in length.

Five minutes per team.

Session 9 (February)

IT BEST PRACTICES, TECHNOLOGY PRESENTATIONS. SCHOOL SERVICES PRESENTS: RESUME, LEADERSHIP, COLLECTIVE BARGAINING AND OTHER DISTRICT ISSUES

FEBRUARY 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?

Do you have an Acceptable Use Policy in place for employees? What policies and procedures are in place relative to technology?

Interview practice. As this interview comes to a close, please tell us why you think you are the best person for the job? Why should we hire you?

February WRITTEN Assignments

The resume and cover letter is the written assignment.

FEBRUARY Assignments

Bring your completed resume, application, and cover letter to class. We will have an opportunity for classmates to critique. After input, make any revisions you think appropriate and we will have you send to School Services of CA and Carol Berg for review. Results to be provided at the March meeting.

Technology Presentations

Using your assigned FCMAT Review Study teams prepare a Board of Trustees presentation on your team's plan to implement the findings and recommendations of the study.

The Written part of the assigned Study is:

1. Board Agenda Items
2. Written Report to Board
3. PowerPoint Presentation to highlight the written report

Presentations should be planned for 15, 10 and 5 minutes in length during the February session.

You will be informed just prior to your presentation of the time that will be allowed by the Board President

- 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 Risks of and to Implementation
- Participation by other district departments and school sites
- Participation by others outside the District

Teams' Oral Presentations should be as close to 15, 10 or 5 minutes as possible in length.

- The member listed in position 1. will be the Team Leader.
- Each member of the team must have an equal part of the presentation

Session 10 (March)

PURCHASING AND BIDDING, EVALUATION OF EMPLOYEES, APPLYING FOR THE JOB, FIRST 100 DAYS. GRADUATION!

MARCH MENTOR DISCUSSION TOPICS

Talk to your mentor about the role of a CBO relative to purchasing? What do they feel is most critical for a CBO to be aware of?

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

What advice does your mentor have relative to collective bargaining?

How do you prepare for negotiations? What has been their greatest challenge? Their greatest learning? Ask them to tell you the top THREE things a CBO should remember to be successful in negotiations.

MARCH Assignments

Participant and mentor meet to review and assess the participant's eligibility for CBO certification.