

# CBO Mentor Project

Class #2

May 9 and 10, 2008

# DRAFT Outline

	<b>2</b>	<b>3</b>	<b>4</b>
	May 9 & 10	June 27 & 28	August 22 & 23
<b>2:00 to 4:00</b>			
5:00 to 6:00	Working Dinner	Working dinner - leadership problems	Working Dinner
6:00 to 6:30	May Revise (Sandy Silberstein)	County office Fiscal Oversight (Wendy Benkert)	Financial reporting (Francie Heim)
6:30 to 7:00			
7:00 to 7:30	Leadership Strengths exercise	Fiscal Crisis-FCMAT perspective (Joel Montero)	
7:30 to 8:00			
8:00 to 8:30	Budget Presentation (Bill McGuire)		
8:30 to 9:00			
<b>Saturday</b>	<b>Saturday</b>	<b>Saturday</b>	<b>Saturday</b>
8:00 to 8:30	School Finance - Revenue (Francie Heim)	Leadership "21"	Financial reporting (Francie Heim)
8:30 TO 9:00			
9:00 to 9:30			
9:30 to 10:00		Legal issues & Contracts (Harold Freiman Lozano Smith)	
10:00 to 10:30			
10:30 to 11:00			
11:00 to 11:30			
11:30 to 12:00			
12:00 to 12:30	working lunch	LUNCH	LUNCH
12:30 to 1:00	School Finance (Francie Heim)	Accounting Basics/Financial Reporting (Francie)	Financial reporting (Francie Heim)
1:00 to 1:30			
1:30 to 2:00			
2:00 to 3:00			

# Introduction of Guests

## Celebrations

## Challenges

## 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
DeGeyer	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	Roslyne	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

# MENTOR DISCUSSION

Discuss with your mentor what they think 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.

# MENTOR DISCUSSION

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.

# MENTOR DISCUSSION

- Discuss your income topic selection.

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?

# MENTOR DISCUSSION

- 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 (guidelines provided)
2. Come prepared to talk (TWO MINUTES) about student achievement in your district.
3. 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.

4. Attend a board meeting in June where a budget is being presented.  
(Your district, your mentor’s district, or another district of your choice).

**WORKING DINNER**

**Random Selection**

**Stand**

**Identify the district selected**

**Research relative to Student Achievement  
(e.g. who did you talk to, where did you go for resource  
documents)**

**Talk about student achievement in your district  
(or selected district)**

**2 MINUTETALK**

Stop watch for each table.

Volunteer time keeper.

# Sandy Silberstein (6:00 to 7:00)

## Budget Update

### Biography-

Sandy Silberstein is the Assistant Executive Director for the California Association of School Business Officials (CASBO). In that capacity she serves as CASBO's Director of Governmental Relations and chief lobbyist representing the organization's 4000 members on the full range of school finance issues affecting California's K-12 public schools and community colleges.

Sandy has 20 years of experience in public policy development and advocacy on behalf of K-12 public schools, and 13 years experience working in California public schools.

Prior to coming to CASBO in 2005, Sandy had a long career as an education advocate for numerous other education associations, community colleges, and K-12 school districts, - including the Riverside County Schools Advocacy Association, California County Superintendents Educational Services Association, the Coalition for Adequate School Housing, and the Community College Facilities Coalition.

She also spent five years working inside the State Capitol as staff consultant to former State Senator Robert Presley, where she focused on a wide variety of public policy issues, with a primary focus on K-12 education.

Sandy is a credentialed teacher, who started her career in the public schools, serving both as a classroom teacher and administrator. She holds a Bachelor of Arts in Government and a Masters in Public Policy and Administration from California State University, Sacramento.

BREAK

7:00 to 7:10

Leadership  
Exercise

7:10 to 7:40

*Approximate times*

*Bill McGuire will put us to work in Teams.*

# Budget Presentation (7:40 to 9:00)

Board Agenda Item

Budget Adoption

Presentation by:

Associate Superintendent, Bill McGuire

30 minutes presentation

Questions by the Board

Audience questions

Adoption

Budget Role Assignments	
CURRENT BOARD MEMBER WHO IS KNOWN FOR BEING RATIONAL	Barnes, Leslie
BOARD MEMBER SUPPORTED BY CSEA	Booth, Cassandra
BOARD MEMBER WHO USED TO BE A TEACHER IN THE DISTRICT BUT WAS FIRED	Cabey, Shawn
FORMER RECALLED BOARD MEMBER	Cherniss, Alex
BOARD MEMBER WHO USED TO BE THE CBO OF THE DISTRICT IN 1945	Craig, Aubrey
SOCCER MOM	Cunnane, Kathy
PARENT OF A CHILD WITH SPECIAL NEEDS	Deaton, John
PARENT OF A CHILD ENROLLED IN GATE	DeGeyter, Julienne
HIGH SCHOOL MATH TEACHER	Duldulao, Filipinas
HIGH SCHOOL FOOTBALL COACH	Elia, Sam
KINDERGARTEN TEACHER	Fagan, Richard
BAND TEACHER	Flores, David
NEWSPAPER REPORTER (LOCAL PAPER) SEASONED VETERAN OF 6 MONTHS	Fogerty, Michael
CSEA PRESIDENT	Glaspey, Melody
CSEA MEMBER - NEW TO NEGOTIATION TEAM	Hawkins, Brian
ECTA PRESIDENT	Jorgensen, Steven
ECTA MEMBER - NEW TO NEGOTIATION TEAM	Kimmel, Karen
RETIREE OF THE DISTRICT - FORMER ADMINISTRATOR	Lantsberger, Scott
CRANKY CURMUDGEON WHO WRITES WEEKLY LETTERS TO THE EDITOR	Manansala-Smith, Roslyne
INTERESTED PARENT - CPA	McCoy, Mark
INTERESTED PARENT - CEO OF A LARGE COMPANY	Sepulveda, Richard
INTERESTED PARENT - opposed too school fees	Statton, Christine
INTERESTED PARENT WILLING TO RUN FUNDRAISERS TO SOLVE ALL THE PROBLEMS	Trader, Jeffery
BILL MCGUIRES BEST FRIEND THERE FOR MORAL SUPPORT	VanBuskirk, Peter
CONTINUATION PRINCIPAL	Ward, Steve
INTERESTED PARENT - HEAD OF TECHNOLOGY COMPANY	Willis, Jason

# EVALUATIONS/OTHER

- MONDAY MORNING SURVEY FROM BILL M. – PLEASE RESPOND
- MONDAY MORNING – LETTER FROM FRANCIE RECAPPING THE WEEKEND

# NEXT CLASS

- **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 2<sup>nd</sup> 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.**

# June assignments

- 1. Income Topic – First DRAFT to your mentor for review by July 1.**
  - 1. Rewrites done by August 1 and submitted electronically to Francie for review and comments**
- 2. User Friendly BUDGET. We will provide early information on this project in June. Don't wait until the last minute. To be submitted by the October meeting.**
- 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 – will be provided at the June meeting. (book and assignment to follow)**
- 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!**