



# CBO MENTOR PROJECT

January 9 & 10, 2009

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## REMINDER

- If you don't receive the Monday letter, go online.
- FCMAT.org
  - Professional Development
    - CBO Mentor Project
- [http://www.fcmat.org/stories/storyReader\\$1293](http://www.fcmat.org/stories/storyReader$1293)
- Curriculum materials, Monday morning letter, evaluation results, are posted

# SCHEDULE

- Friday night  
2:00 to 5:00 Completion of mid year evaluations

January assignments:

Budget Crisis Response

Read Good to Great

You should have replied to the 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

2008-09 CBO Mentor Project

	8	9	10
	January 9 & 10, 2009	February 6 & 7	March 6 & 7
2:00 to 5:00	MID Year Evaluations		
5:00 to 6:00	Working Dinner - Review Budget Crisis Response	Working Dinner (Carol Berg)	Dinner (Carol Berg)
6:00 to 7:30	Special Education - Francie	IT Best Practices	Purchasing & Bidding
7:30 to 8:30		Technology Presentations	Employee Evaluations
8:30 to 9:00	Tech Presentations class time to get started		
<b>Saturday</b>	<b>Saturday</b>	<b>Saturday</b>	<b>Saturday</b>
8:00 to 9:00	Transportation (Bill McGuire)	District Issues & Negotiations (School Services )	Applying for the Position of CBO
9:00 to 10:30	Maintenance & Operations (Bill McGuire)		
10:30 to 12:00	Good to Great		
12:00 to 12:30	Lunch	LUNCH	Lunch
12:30 to 1:30	Enrollment Projections - Bill McGuire	District Issues & Negotiations (School Services )	Your first 100 days (Bill McGuire & Ron Bennett)
1:30 to 3:00			Graduation lasts until 3:30

# NOVEMBER & JANUARY MENTOR 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?

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.

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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.

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

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?(November)

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?  
(January)

February interview question:

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?  
Do you have any questions for the panel?

# BUDGET CRISIS RESPONSE EXERCISE

Assume the district fiscal situation is basically the same as 2006-07

(you are drawing your conclusions based on 2006-07 data – close enough for this exercise – don't do this at home)

Sample District Assigned to each team

You have data:

2006-07 End of year actuals (GF)

2006-07 Revenue detail (GF actuals)

2006-07 Summary of all funds

2007-08 Revenue Limit detail

2007-08 Revenue Limit ADA detail

## 1. Overview of the political situation

Prepare a summary (less than one page) that describes the budget problem in California

## 2. Define the scope of the potential problem for your assigned district in 2008-09 and 2009-10.

Define assumptions as to how you come up with the scope. You will need to take into account:

Structural deficit of district

Reserve assumptions

Assumptions on revenue limit loss, categorical loss

step & column increases

Other increases

# PLANNING FOR THE CRISIS

## TEAM DISCUSSION

How do you insure your district leadership team is on-board and informed? What are the challenges?

What are your district talking points relative to the budget? What do you think are the key elements that should be included?

What is the district communication strategy to ensure that all district stakeholders are kept apprised of the situation (despite the fact that it is a moving target).

What are the key elements to take into consideration when developing a communication strategy? Who are your stakeholders?

What is your budget reduction decision making strategy?

What are the ways in which the district superintendent provides leadership in these uncertain times to arrive at recommendations to the board for budget reductions (potential for 2008-09 mid year reductions and 2009-10). What is the role of the CBO in supporting Superintendent leadership?

What are the various ways in which budget committees are used to inform and assist in the budget process.

Develop a strategy and timeline.

# END PRODUCT FOR YOUR TEAM (BASED ON THE ASSIGNED SAMPLE DISTRICT)

## Summary Document (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.**

#### GOAL:

Use your analytical skills in reviewing financial information to “ballpark” the situation.

Use your knowledge of school finance to assess the current budget situation and develop recommendations to ensure fiscal solvency.

Use the best thinking of your team to develop leadership strategies as we face the most challenging budget times we have faced in California.

# BUDGET CRISIS TEAMS

Team	Last Name	First Name
1	Jorgensen	Steven
1	VanBuskirk	Peter
1	Fagan	Richard
1	Statton	Christine
2	Craig	Aubrey
2	Cunnane	Kathy
2	Kimmel	Karen
2	McCoy	Mark
3	Hawkins	Brian
3	Cherniss	Alex
3	Trader	Jeffery
3	Manansala-Smith	Roslyne
4	Booth	Kassandra
4	Sepulveda	Richard
4	Lantsberger	Scott
4	Glaspey	Melody
5	Cabey	Shawn
5	Duldulao	Filipinas
5	DeGeyter	Julienne
5	Flores	David
6	Willis	Jason
6	Barnes	Leslie
6	Ward	Steve

Santa Monica, LA 1  
 Davis Unified, Yolo 2  
 Folsom Cordova, Sacramento 3  
 King, Monterey 4  
 Brentwood, Contra Costa 5  
 Berkeley, Alameda 6

# FEBRUARY MENTOR DISCUSSIONS

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 their prediction for mid year reductions?

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?

# FEBRUARY ASSIGNMENTS

**FCMAT Technology Study Presentations.** Hopefully you took advantage of the time provided at the last meeting to get an early start on this project with your team. The written part of the assigned study is:

- Board agenda items
- Written report to the board
- PowerPoint presentation to highlight the written report.
- Presentations should be planned for 15, 10 and 5 minutes in length.

Scope:

- 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 risk of and to implementation
  - Participation by other district departments and school sites
  - Participation by others outside the district

# FEBRUARY ASSIGNMENTS

Your **completed resume and application package** for a CBO position is due. Your mentor should have reviewed the materials prior to submission and provided you with input. Your package will be reviewed by School Services of CA and Carol Berg.

You have **THREE** districts to choose from – details on attached sheet.

## WARNING.

The top resume and application packages will be highlighted by Ron Bennett and Carol Berg (School Services of CA) and given special recognition.

Each and every one of you will get the type of detailed feedback you have requested. This will be some of the most valuable feedback you will receive in your career.

We suggest that you use your mentor (and other support) to help you polish up your resume and application before submitting to Carol Berg.

# FEBRUARY ASSIGNMENTS

## **ASSOCIATE SUPERINTENDENT, BUSINESS SERVICES**

### **Woodland Joint Unified School District**

Enrollment: 10,500 N Yolo County

Seeking an Associate Superintendent of Business Services with:

Demonstrated experience in all aspects of school financial planning and budget development

Knowledge in the areas of fiscal services; maintenance, operations, and facilities; purchasing; and transportation

Strong written and verbal presentation skills

Salary range is \$144,939 to \$155,676 (224 day work year)

Plus an attractive fringe benefits package is also provided

**Application Deadline: January 7, 2009**

## **CHIEF BUSINESS OFFICIAL**

### **Millbrae School District**

Enrollment: 2,100 \* San Mateo County

Seeking a Chief Business Official with:

In-depth knowledge of budgetary, accounting, fiscal procedures, policies, and methods of a district

Ability to formulate plans and policies; organize, staff, direct, and control the work of others; analyze and make sound recommendations on complex problems

Experience in a responsible business position in a school district preferred, or comparable experience in other public or private agencies

The salary for this position is \$132,831; an attractive fringe benefit package is also offered, including paid professional membership fees and mileage allowance.

**Application Deadline: February 2, 2009**

# FEBRUARY ASSIGNMENTS

## **ASSISTANT SUPERINTENDENT, FISCAL SUPPORT SERVICES**

### **Lake Elsinore Unified School District**

Enrollment: 21,700 \* Riverside County

Seeking an Assistant Superintendent, Fiscal Support Services with:

Demonstrated experience in performing management and fiscal support services

Knowledge of principles, practices, and trends of public education

Strong written and verbal presentation skills

Salary range is \$140,663 to \$157,564 (plus a mileage stipend)

An excellent fringe benefits package—including fully paid PERS/STRS—is also offered, plus a \$1,200 stipend for a doctoral degree

**Application Deadline: February 16, 2009**