

To: CBO Mentor Project Participants
Five Star Leaders



From: Francie Heim (and the team; Bill McGuire, Bill Gillaspie, Mary Turcotte)

Date: November 24, 2008

Seven down and three to go!

IMPORTANT REMINDERS

Are all of your assignments in? We will be using some down time in December to review all assignments submitted and provide feedback in January.

Mid Year Evaluations – if not done yet – we will see you January 9 prior to class.

**Read Good to Great – complete Zoomerang
Monday Morning ZOOMERANG Survey - complete**

You all survived the much awaited November class and no one was voted off the island. We certainly had no trouble finding you on the island – your blue shirts made you highly visible.

Your presentations on Friday night raised the bar. Great Job! We appreciated the opportunity to meet individually with each of you this weekend to discuss your progress to date and your future role as a CBO.

You were not the only ones under pressure. **WE** survived the mid-year evaluation process. Each year we meet with the mentors and participants separately and ask them to tell us how we are doing and how we can improve. The feedback is always welcome and we try to incorporate your thoughts in our sixth cohort planning as well as revising our approach for the January, February and March sessions. What we consistently hear is that we need to provide each of you more personalized feedback on your progress. Your mentors also request more feedback on your progress so they can in turn provide feedback to you.

Our thanks to School Innovation and Advocacy (SI&A) for underwriting your registration at the CBO symposium – it is a great event with timely information in these uncertain times.

Teri Prichard (Merced County Schools Insurance Group) as always does an amazing job on the topic of workers compensation. She also wins the award for using the most acronyms (e.g. EE, AIL, PEL, PAL, IBNR, TPA, JPA, RTW, MEM, etc, et.al...) . As Bill McGuire indicated, this two hour session can save you many hundreds of thousands of dollars in your future role as a CBO.

Paula Chu Tanguay, CEO for ASCIP (Alliance of Schools for Cooperative Insurance Programs), kept the class fully engaged as she presented on the topic “Managing Property/Liability Risks in Public Education (A to Z)”. The presentation was chock full of valuable advice that will serve you well in your future role as a CBO.

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?

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.

We did not cover these at the November session – so expect some questions in January!

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 Questions

Interview Question from last month (be prepared to answer in January)

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?

New 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?

January Assignments

1. Read Good to Great

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

- a. **Level 5 leadership**
- b. **Getting the right people on the bus**
- c. **Confronting the brutal facts**
- d. **The hedgehog concept**
- e. **Culture of discipline**
- f. **Turning the flywheel**

2. Budget Crisis Response Project (details in your handout)

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.

3. Attend a Collective Bargaining session.
4. Update your resume. More details to come.

FUTURE MEETING SCHEDULE

Meeting Schedule

2008-09 CBO Mentor Project

	8	9	10
	January 9 & 10, 2009	February 6 & 7	March 6 & 7
2:00 to 4:00	MID Year Evaluations		
5:00 to 6:00	Working Dinner - Review Budget Crisis Response	Working Dinner (catch up time)	Dinner
6:00 to 7:30	Enrollment Projections (Steve Adams and Bill McGuire)	IT Best Practices	Purchasing & Bidding
7:30 to 9:00	Tech Presentations class time to get started	Technology Presentations	Employee Evaluations
Saturday	Saturday	Saturday	Saturday
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	Special Education (Francie Heim)	District Issues & Negotiations (School Services)	Your first 100 days (Bill McGuire & Ron Bennett)
1:30 to 3:00			Graduation lasts until 3:30

CLASS STRENGTHS & STYLES

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
DeGeyter	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	Roslynne	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

CLASS STRENGTHS & STYLES

Sort of Styles - TOP 3 Rankings			
Name	Style	Score	Ranking
Fogerty, Michael	Accomodating	8	1
Deaton, John	Accomodating	7	2
Manansala-Smith, Roslyne	Accomodating	10	2
McCoy, Mark	Accomodating	7	2
Statton, Christine	Accomodating	7	2
DeGeyter, Julienne	Accomodating	5	3
Sepulveda, Richard	Accomodating	6	3
Cunnane, Kathy	Avoiding	8	1
DeGeyter, Julienne	Avoiding	11	1
Glaspey, Melody	Avoiding	9	1
Jorgensen, Steven	Avoiding	9	1
Manansala-Smith, Roslyne	Avoiding	10	1
McCoy, Mark	Avoiding	7	1
Sepulveda, Richard	Avoiding	10	1
Kimmel, Karen	Avoiding	6	2
Booth, Kassandra	Avoiding	5	3
Craig, Aubrey	Avoiding	7	3
Duldulao, Filipinas	Avoiding	6	3
Elia, Sam	Avoiding	6	3
Fagan, Richard	Avoiding	7	3
Flores, David	Avoiding	7	3
Statton, Christine	Avoiding	6	3
Trader, Jeffery	Avoiding	7	3
VanBuskirk, Peter	Avoiding	6	3
Willis, Jason	Avoiding	6	3
Booth, Kassandra	Collaborating	10	1
Cabey, Shawn	Collaborating	8	1
Fagan, Richard	Collaborating	8	1
Flores, David	Collaborating	8	1
Trader, Jeffery	Collaborating	8	1
Ward, Steve	Collaborating	9	1
Cherniss, Alex	Collaborating	8	2
Craig, Aubrey	Collaborating	7	2
Cunnane, Kathy	Collaborating	7	2
Duldulao, Filipinas	Collaborating	7	2
Elia, Sam	Collaborating	9	2
VanBuskirk, Peter	Collaborating	6	2
Willis, Jason	Collaborating	6	2
Fogerty, Michael	Collaborating	7	3
Glaspey, Melody	Collaborating	6	3
Hawkins, Brian	Collaborating	6	3
Lantsberger, Scott	Collaborating	7	3
Craig, Aubrey	Competitor	8	1
Cabey, Shawn	Competitor	7	2
Fogerty, Michael	Competitor	7	2
Hawkins, Brian	Competitor	7	2
Lantsberger, Scott	Competitor	7	2
Cherniss, Alex	Competitor	7	3
Deaton, John	Competitor	5	3
Jorgensen, Steven	Competitor	6	3
Kimmel, Karen	Competitor	5	3
McCoy, Mark	Competitor	5	3
Ward, Steve	Competitor	5	3
Cherniss, Alex	Compromising	9	1
Deaton, John	Compromising	8	1
Duldulao, Filipinas	Compromising	11	1
Elia, Sam	Compromising	11	1
Hawkins, Brian	Compromising	8	1
Kimmel, Karen	Compromising	11	1
Lantsberger, Scott	Compromising	10	1
Statton, Christine	Compromising	11	1
VanBuskirk, Peter	Compromising	9	1
Willis, Jason	Compromising	9	1
Booth, Kassandra	Compromising	10	2
DeGeyter, Julienne	Compromising	8	2
Fagan, Richard	Compromising	7	2
Flores, David	Compromising	7	2
Glaspey, Melody	Compromising	8	2
Jorgensen, Steven	Compromising	8	2
Sepulveda, Richard	Compromising	9	2
Trader, Jeffery	Compromising	8	2
Ward, Steve	Compromising	8	2
Cabey, Shawn	Compromising	5	3
Cunnane, Kathy	Compromising	7	3
Manansala-Smith, Roslyne	Compromising	6	3