



CBO Mentor Project Monday Morning Letter  
Class Update - #3

To: CBO Mentor Project Participants  
Cohort #5

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

Date: June 28, 2008

Three down and seven to go! What a weekend – Fiscal Oversight, Legal Contracts, and Reading Financial Reports! And some leadership exercises thrown in for good measure.

**IMPORTANT REMINDERS**  
**Monday Morning ZOOMERANG Survey - complete**  
**Mentor discussion before next class (official list below)**  
**Assignments for next class (official list below)**

**Wendy Benkert** did her usual outstanding job on Friday night. When she speaks about fiscal oversight, she reinforces the critical importance of relationships. As a County Office CBO, she makes it her business to build relationships with Orange County district CBOs. And your role as a CBO is to appreciate the importance of the relationship with your County Office. In difficult financial times, they can be of invaluable support in reinforcing your message of the need to make budget reductions.

**We missed Joel Montero** on Friday night. But since he wasn't there to tell stories, Francie and Bill McGuire and Bill Gillaspie and Wendy all pitched in to tell stores of fiscal crisis and some great "how could someone be that stupid" stories. We can't replace Joel though, so we are hoping he will make a return engagement.

**Megan Macy**, attorney from Lozano Smith, provided GREAT free legal advice on Saturday morning. Three hours of contracts barely scratched the surface of all you need to know, but you are definitely better prepared to face contract challenges in the future.

You all managed to stay awake on Saturday afternoon, not an easy task since the topic was Accounting Basics and Financial Reports. What worked well is that we skipped the accounting basics, but jumped quickly to the basics of reading financial reports. We will of course cover the accounting basics material at the next session. Our sample "crisis" district

story is always a good learning tool for “what not to do” and how a simple review can avert a potential fiscal disaster.

Thoughts to keep in mind:

Our **core business** is **TEACHING** and our **product** is **STUDENT LEARNING**.

**Vision and Passion** come from the heart. What are you passionate about in relationship to the field of School Business? How does this translate to vision? “Vision without action is a dream. Action without vision is simply passing the time. Action with Vision is making a positive difference” Joel Barker

### 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?

NEW. We are going to start practicing early for you CBO job interview. Ron Bennett and Carol Berg will be joining us at our last class to help you practice your interview skills. But rather than leaving that major skill set to the very last class, we thought we would begin threading practice interview questions into your mentor conversations. So...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 Assignments

1. Income Topic – First DRAFT to your mentor for review by July 1.  
Rewrites done by August 1 and submitted electronically to Francie for review and comments
2. 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.
3. 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!

4. Leadership workbook Team assignment (from Bill McGuire). Details provided in your June class book but repeated here.

Team A – Laws 1-4

Team B – Laws 5-8

Team C – Laws 9-12

Team D – Laws 13-16

Team E – Laws 17-21

<u>Team A</u>	<u>Team B</u>	<u>Team C</u>	<u>Team D</u>	<u>Team E</u>
Michael	Kathy	Julienne	Melody	Steve J.
Roslynne	Mark	Richard S.	Shawn	Aubrey
Richard F.	David	Jeffery	Steve W.	Kassandra
Leslie	Alex	Fil	John	Sam Peter
Brian	Karen	Scott	Christine	
Jason				

Each group member will read the Laws assigned and complete the following (Bill will be sending you additional information in a separate email):

- 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 on Friday August 22, 2008. 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.

5. Financial Assignment (from Francie – details in your June class book but repeated here)

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 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.

<u>Team A</u>	<u>Team B</u>	<u>Team C</u>	<u>Team D</u>	<u>Team E</u>
Michael	Kathy	Julienne	Melody	Steve J.
Roslynn	Mark	Richard S.	Shawn	Aubrey
Richard F.	David	Jeffery	Steve W.	Kassandra
Leslie	Alex	Fil	John	Sam Peter
Brian	Karen	Scott	Christine	
Jason				

## FUTURE MEETING SCHEDULE

April 4 & 5 2008
May 9 & 10
June 27 & 28
August 22 & 23
September 12 & 13
October 17 & 18
November 20,21,22 CBO Symposium
January 9 & 10 2009
February 6 & 7
March 6 & 7

### Meeting Schedule .

You should have all the dates in your calendar. All of these are in Sacramento except the November class held in connection with the CASBO CBO symposium. More details to follow. The DRAFT schedule of classes for the year is in your introductory binder BUT we do modify topics and times throughout the year based on changing speaker needs or adjusting for time for specific topics. We will provide an update with each

“Monday Morning Letter”.  
Dates won’t change however.

	<b>3</b>	<b>4</b>	<b>5</b>
	June 27 & 28	August 22 & 23	September 12 & 13
<b>2:00 to 4:00</b>			
5:00 to 6:00	Working dinner - leadership problems	Working Dinner	Working Dinner
6:00 to 6:30	County office Fiscal Oversight (Wendy Benkert)	Financial reporting (Francie Heim)	Budget Development (Bill McGuire)
6:30 to 7:00			
7:00 to 7:30			
7:30 to 8:00	Fiscal Crisis-FCMAT perspective (Joel Montero)		
8:00 to 8:30			
8:30 to 9:00			
<b>Saturday</b>	<b>Saturday</b>	<b>Saturday</b>	
8:00 to 8:30	Leadership "21"	Financial reporting (Francie Heim)	Medical Benefits (Teri Ezaki)
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		Budget Development	
12:00 to 12:30	LUNCH	LUNCH	LUNCH
12:30 to 1:00		Financial reporting (Francie Heim)	Budget Development
1:00 to 1:30			
1:30 to 2:00	Accounting Basics/Financial Reporting (Francie)		
2:00 to 3:00			

## 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