

CBO Mentor Project



CBO Mentor Project Monday Morning Letter
Class Update #1

To: CBO Mentor Project Participants
Cohort #6 (as yet unnamed)

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

Date: April 6, 2009

Our thanks to you for an amazing weekend! This letter is longer than usual but contains a great deal of critical information for you as you prepare for the next class.

And our materials (letters & curriculum) are posted to FCMAT website (Professional Development/CBO Mentor Project):

[http://www.fcmat.org/stories/storyReader\\$1118](http://www.fcmat.org/stories/storyReader$1118)

IMPORTANT REMINDERS

Monday Morning ZOOMERANG Survey
Mentor discussion before next class (official list below)
Assignments for next class (official list below)
CASBO Conference CBO Mentor Project Annual Meet and Greet/Social
Del Mar Room Marriott Hotel San Diego
April 6 from 3:30 – 5:00
Hosted by FCMAT, School Services of CA, Bill McGuire & Francie Heim

It was a pleasure to meet our sixth class of future CBO's. Having graduated five classes of future CBO's, we continue to be astounded by the diversity and talents of the groups we have the privilege to teach and mentor.

One of the recommendations of Class #3 was to start early on the first Friday and spend some time for the **group to get acquainted**. Relationships are critical to your success as a CBO, and this class is the beginning of your support network. Starting with your new best

friend, Joel Montero.. Who will take up the challenge to be the first class member to know the entire class by first and last names? Someone asked my secret to learning all your names in two hours. Throughout my career, I have been terrible at remembering names. BUT, with the CBO Mentor program it simply became a priority to focus, learn and remember.

Be thinking about your **Class Name**. Names to date: First Class, 2nd to None, Joel's Favorite; We Raised the Bar, Fantastic Fourth.

Joel Montero (CEO of FCMAT) welcomed both Mentors and Participants on Friday night. We appreciate that FCMAT provides financial support for this program, but equally grateful for the passion and belief in the program that you heard clearly expressed by Joel.

The Mentor turnout on Friday was the best ever. **Bill Gillaspie and Mary Turcotte** provided an orientation to the mentors, as well as providing a binder of resource materials. For those who didn't receive a binder, Bill Gillaspie will be sending them by mail. Also, check the FCMAT website for online versions of the information. Mentors are always welcome to attend any session.

We extend our thanks to **Terry Bradley**, Superintendent of Clovis Unified and **Michael Bishop**, CBO of Paramount Unified School District. Their words of wisdom on "What it means to be a CBO" are reinforced by a wealth of experience.

A recommendation from Class #4 was to redesign the Friday evening session. We added **the panel of "alumni"** to share real life stories of becoming a CBO. It is our favorite part of the weekend, because we get to see old friends from previous classes and delight in their success stories.

Bill Gillaspie did a great job pinch hitting Saturday morning filling in for our guest speaker, Ken Hawkins, who had a family emergency. Many thanks!

Another part of the program we look forward to is the **"Strengths"** analysis as well as the Competition/Collaboration/Compromise/Avoid/Accommodate analysis. As core instructors, Bill McGuire and I look forward to the entertaining mix of "Strengths" and styles that each cohort brings to the table. The class "Strengths" are attached to this letter for future reference. This class brings an unusual high number of competitors and very few collaborators. Bill of course thinks this is the perfect mix, while I have great trepidation.

Hopefully you are getting a sense of our team. It is a perfect illustration of how various strengths combine to make a group more effective. I have repeated below the chart we shared, that shows the **strengths of the team**. We have a limited number of strengths in common, which makes us a stronger team.

	Francie Heim	Bill McGuire	Bill Gillaspie	Mary Turcotte
1	Strategic	Includer	Empathy	Connectedness
2	Responsibility	Competition	Harmony	Consistency
3	Learner	Activator	Positivity	Empathy
4	Focus	Self-Assurance	Developer	Ideation
5	Woo	Ideation	Woo	Relator
Style	Competing Accommodating	Competing	Collaborating	Compromising

You have probably already realized that we will be using your various strengths to build working groups throughout the year. Get ready for some challenges and opportunities for learning.

We focus on public speaking in this class, but our last class helped us realize the need to focus on writing skills. FCMAT generously provided their team of writers to the class; **Laura Haywood, John Lotze, and Leonel Martinez.** Their passion for the written word is contagious. They provided so much valuable advice and “food for thought”. As a result, this letter is taking me FOREVER to write.

Below are your assignments.

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.

Come to class prepared. You will be called on in class to share the results of these discussions.

MAY Written Assignment

Prepare a 200 – 300 word summary that describes your district revenue limit funding for 2008-09. 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.**

You will be given an opportunity to rewrite the assignment AFTER the class on school finance. So please consider this a first DRAFT.

This website link will provide the most recent state certified version of your revenue limit.

<http://ias.cde.ca.gov/apportionment/ias.aspx?schoolyearid=2008&RptType=P1&CertType=Non>

For those new to revenue limits, if you need more help and support for this assignment, please contact the instructor, fheim@edcoe.org or your mentor. We will cover this in great detail at the next session. This assignment is to start the process of orienting you to this topic.

Assignments due for May

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 8
 - 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).

CURRENT BOARD MEMBER WHO IS KNOWN FOR BEING RATIONAL	Bachofer	Jack
CONTINUATION PRINCIPAL	Barber	Donna
BOARD MEMBER SUPPORTED BY CSEA	Beeman	Keith
BOARD MEMBER WHO USED TO BE A TEACHER IN THE DISTRICT BUT WAS FIRED	Bellonzi	Helen
FORMER RECALLED BOARD MEMBER	Bentley	Debbie
BOARD MEMBER WHO USED TO BE THE CBO OF THE DISTRICT IN 1945	Buckhout	Pam
SOCCER MOM	Carevic	Laura
INTERESTED PARENT - HEAD OF TECHNOLOGY COMPANY	Chow	Carolyn Strehlow
PARENT OF A CHILD WITH SPECIAL NEEDS	Curtis	Megan
PARENT OF A CHILD ENROLLED IN GATE	Deming	Patricia
HIGH SCHOOL MATH TEACHER	Ensign	Lisa
NEWSPAPER REPORTER (LOCAL PAPER) SEASONED VETERAN OF 6 MONTHS	Fabre	Linda
INTERESTED PARENT - opposed too school fees	Fregoso	Martin
KINDERGARTEN TEACHER	Fry	Debbie
BAND TEACHER	Goodner	Jennifer
HIGH SCHOOL FOOTBALL COACH	Hawkins	Yancy
CSEA PRESIDENT	Hellier	Gaby
CSEA MEMBER - NEW TO NEGOTIATION TEAM	Lightfoot	Ashley
ECTA PRESIDENT	Merrill	Michael
ECTA MEMBER - NEW TO NEGOTIATION TEAM	Napier	Jeff
RETIREEE OF THE DISTRICT - FORMER ADMINISTRATOR	Perkins	Kathryn
CRANKY CURMUDGEON WHO WRITES WEEKLY LETTERS TO THE EDITOR	Price	Scott
INTERESTED PARENT - CPA	Rash	Gregory
INTERESTED PARENT - CEO OF A LARGE COMPANY	Reines	Candace
OWNER OF LOCAL CONSTRUCTION COMPANY WHO HAS NOT RECEIVED ANY WORK FROM THE DISTRICT	Rivera	Todd
INTERESTED PARENT WILLING TO RUN FUNDRAISERS TO SOLVE ALL THE PROBLEMS	Schamberg	Robert
BILL MCGUIRES BEST FRIEND PRESENT FOR MORAL SUPPORT	Van Vleck	Fred

FUTURE MEETING SCHEDULE

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.

May 8 & 9
June 26 & 27
August 21 & 22
September 11 & 12
October 23 & 24
November 19 & 20 & 21
January 8 & 9
February 5 & 6
March 5 & 6

	2	3	4
	May 8 & 9	June 26 & 27	August 21 & 22
5:00 to 6:00	Working Dinner	Working dinner - leadership problems	Working Dinner
6:00 to 6:30	Leadership Strengths exercise	County office Fiscal Oversight (Wendy Benkert)	Independent Audit
6:30 to 7:00			
7:00 to 7:30	Budget Presentation (Bill McGuire)	Fiscal Crisis-FCMAT perspective (Joel Montero)	Medical Benefit Teri Ezaki
7:30 to 8:00			
8:00 to 8:30			
8:30 to 9:00			
Saturday	Saturday	Saturday	Saturday
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		Legal issues & Contracts (Harold Freiman Lozano Smith)	
9:30 to 10:00			
10:00 to 10:30		CASH	
10:30 to 11:00			
11:00 to 11:30			
11:30 to 12:00	Politics of School of Finance (Kevin Gordon)		
12:00 to 12:30	working lunch	working lunch	working lunch
12:30 to 1:00	School Finance (Francie Heim)	Leadership "21"	Financial reporting (Francie Heim)
1:00 to 1:30			
1:30 to 2:00		Trend Analysis Financial Reporting (Francie)	
2:00 to 3:00			

CLASS STRENGTHS & STYLES

First Name	Last Name	Strength 1	Strength 2	Strength 3	Strength 4	Strength 5
Jack	Bachofer	Achiever	Learner	Strategic	Deliberative	Strategic
Donna	Barber	Relator	Achiever	Maximizer	Woo	Communication
Keith	Beeman	Achiever	Analyst	Learner	Input	Deliberative
Helen	Bellonzi	Achiever	Includer	Analytical	Arranger	Connectedness
Debbie	Bentley	Consistency	Harmony	Responsibility	Arranger	Includer
Pam	Buckhout	Harmony	Responsibility	Achiever	Analytical	Focus
Laura	Carevic	Learner	Deliberative	Relator	Individualization	Connectedness
Carolyn	Chow	Harmony	Deliberative	Discipline	Focus	Responsibility
Megan	Curtis	Strategic	Maximizer	Achiever	Self-Assurance	Relator
Patricia	Deming	Positivity	Strategic	Relator	Arranger	Developer
Lisa	Ensign	harmony	individualization	arranger	discipline	responsibility
Linda	Fabre	Strategic	Relator	Communication	Self-Assurance	Maximizer
Martin	Fregoso	Learner	Analytical	Strategic	Responsibility	Achiever
Debbie	Fry	Input	Learner	Achiever	Strategic	Analytica
Jennifer	Goodner	Adaptability	Activator	Empathy	Relator	Context
Yancy	Hawkins	Woo	Context	Positivity	Activator	Maximizer
Gaby	Hellier	Maximizer	Achiever	Relator	Input	Learner
Ashley	Lightfoot	Learner	Arranger	Individualization	Responsibility	Context
Michael	Merrill	Consistency	Restorative	Woo	Responsibility	Arranger
Jeff	Napier	Learner	Responsibility	Ideation	Context	Strategic
Kathy	Perkins	Includer	Arranger	Analytical	Learner	Responsibility
Scott	Price	Positivity	Includer	Restorative	Command	Strategic
Greg	Rash	Harmony	Communication	WOO	Positivity	Arranger
Candace	Reines	Responsibility	Self-Assurance	Analytical	Competition	Achiever
Todd	Rivera	Restorative	Responsibility	Context	Competition	Empathy
Rob	Schamberg	Strategic	Achiever	Self-Assurance	Relator	Arranger
Fred	Van Vleck	Competition	Command	Ideation	Strategic	Activator

