



CBO Mentor Project Monday Morning Letter  
Class Update #2

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

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

Date: May 10, 2009

We look forward each year to a new group of students and are never quite sure what to expect in terms of class dynamics. It is only the 2<sup>nd</sup> class and this class has exceeded our expectations already. We are going to have to “up” our game just to keep up with all of you.

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

Saturday was a grueling day covering school finance but no one overtly slept through the presentation, so I am grateful.

Continue to work on your **Class Name**. The sooner you have your name, the sooner we can order your class shirts. And we still need someone to name all their classmates by first and last names (but kudos to Donna Barber and Patty Deming for giving it a try).

You had a chance to test your team building skills on Friday night with an exciting “**Pyramid Exercise**”! Each year the teams bring new strategies to this exercise and it is great fun to watch.

**Bill McGuire** entertained us with the Clovis Budget presentation. The question and answer period that followed Friday evening and Saturday morning was wonderfully entertaining. It was clear that you all did your homework. We have never had such a theatrical production as we had this weekend. Ashley Lightfoot’s performance was particularly memorable.

Saturday was a day of immersion into the intricacies of **school finance and revenue limit** funding. For those of you who were hearing this for the first time, it was undoubtedly an overwhelming amount of material to absorb. From watching the group, we think the experts also learned some new things. The table “experts” were invaluable and our thanks to you for your support of the team throughout the day. And to those new to school finance, please use your table “expert” as a future resource as well as our instructors.

**Kevin Gordon**, President of School Innovation and Advocacy, provided an entertaining hour of insights into the political process and giving us his unique perspective on the current budget situation.

Now that you have seen a little more of the team, do our strengths start to show? Be thinking about your strengths and the strengths of the various teams you are working with throughout the program. Our job is to prepare you for your future role as a CBO and you will not be successful as a CBO unless you build strong teams around you.

	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 Accomodating	Competing	Collaborating	Compromising

Below are your assignments.

**MENTOR DISCUSSION TOPICS & PRACTICE INTERVIEW QUESTION**

Discuss with your mentor the topic of fiscal oversight (AB 1200) and their experiences in working with their county office.

Post a copy of your district 2<sup>nd</sup> interim approval letter from the county office (using google docs). (for county office participants – select a district in your county)

Talk to your mentor about legal contracts and the most important lessons they have learned over the years relative to contracts.

Interview Question: We understand the need for a reserve for economic uncertainty. However, these are definitely times of great economic uncertainty. What are the conditions whereby use of reserves to balance the budget is acceptable?

## JUNE Assignments

1. MAY Written Assignment - rewrite

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.**

**SUBMIT ELECTRONICALLY on google docs by June 1, 2009**

**Email to the link provided**

**Name the file: lastnameRL e.g. heimRL**

**[cbomentor6@gmail.com](mailto:cbomentor6@gmail.com)**

2. Prepare a 200 – 300 word summary that describes Class Size Reduction Funding in 2009-10. **Describe it as though you were including the description in a budget document. Post to google docs. Name the file with your lastnameCSR. E.g. heimCSR . DUE by June 26, 2009**

3. User Friendly BUDGET. You will receive your CD at the June meeting. School Services will be updating the CD to reflect current changes. You will need to collect historical data, so we will try to get a copy of the past software so you can start the process now and then update with changes in June. An email with more instructions will be arriving before June. This project will be due at the October meeting but an early start is critical.

For future planning:

- Attend a JPA meeting (workers compensation/property & liability/health and welfare) – not due until January.

- Attend a collective bargaining session (by January 2010).
- Get out your resume and start working on it (not due until January 2010).

**If you have not been called on yet, come prepared to talk (TWO MINUTES) about student achievement in your district.**

**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 will not 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

	<b>2</b>	<b>3</b>	<b>4</b>
	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			
<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		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	Politics of School of Finance (Kevin Gordon)		
11:30 to 12:00			
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			