

CBO⁶

CBO Mentor Project Monday Morning Letter
Class Update - #5

To: CBO Mentor Project Participants
Cohort #6

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

Sixth cents

Date: September 12, 2009

1/2 way through! Wow....Budget Budget Budget and some Ethics 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)

November in Monterey – Monterey Marriott Hotel

And please note the change in how assignments are posted to google site.

Assignments Update:

Assignments are currently posted to the google site and placed in a specific folder for that assignment (e.g.end of year variance assignment).

Important note. We are changing the google process and setting up a separate portfolio for each student. Your job is to move your work from the current folder to your own specific folder which is set up under the master folder labeled **NEW/Portfolio Work**. At the end of the class, your folder should contain a copy of ALL your final assignments for the program.

Use this opportunity to make any final edits to assignments previously submitted. We will review all your assignments in **your folder** prior to the November meeting to ensure you are up to date.

CASBO 2009 CBO Symposium (CASBO website)

November 12-13, 2009

Monterey Marriott Hotel \$179 rate. Don't wait to make your reservation.

https://resweb.passkey.com/Resweb.do?mode=welcome_ei_new&eventID=83904
(Bill Gillaspie sent this information in a separate email).

Lori Raineri was entertaining as always on Friday night. She is clearly passionate about the topic of ethics and provoked some thoughtful discussion.

Your presentations on Friday night were AWESOME. I can state with great certainty that we have not seen ANYTHING like it before. You all win the prize for the most creative class.

The “Starbucks” exercise was big fun (for us anyway). We enjoyed watching you worry over the details and then finally move to the BIG picture look.

And Saturday was an action packed discussion on the topic of budgeting. Bill McGuire does an outstanding job of covering this topic and providing you with invaluable information to use in your career as a CBO.

MENTOR DISCUSSION TOPICS

Be prepared to describe how position control works in your district. Discuss this with your mentor and talk about what are the elements critical to position control and what are the barriers to successful implementation.

Ask your mentor about a time in their career where they had a strong working relationship between HR and Business? What made it work?

What are the most pressing issues for your district relative to facilities? What are the barriers to your construction program? Talk to your mentor about what they view as the most critical role of a CBO relative to facilities?

Interview Question

Interview Question:

Our district is planning to have a bond election in order to modernize and expand existing facilities. As the CBO, with oversight of the facilities and a member of the

district leadership team, describe the elements we should be considering as we start the bond election planning process. What are the key things we should be doing?

Assignments

1. Prepare a board summary report of your district prior year actual (2008-09) compared to the last estimate. This report should include:
 - a. Spreadsheet summary of variances from last information told to board and final information at year end with narrative explaining the variances
 - b. Documents to look for:
 - c. 2009-10 Budget to board – find 2008-09 estimated actuals from this document
 - d. 2008-09 Actuals (September 15, 2009 document)

If you do not have a district, request your mentor's assistance in finding a suitable district for analysis. Finished assignment due at the October class (submit electronically).

End of year variance analysis due to your mentor **by September 30** for mentor review and input. The variance analysis will include a narrative and a summary financial document. The template for the financial report will be posted to the google doc site.

Mentor review should be done and rewrites finalized by the **October meeting**. Mentors are asked to pay particular attention to the narrative and provide input that makes the document "board package ready." Your rewritten assignment is due to be posted prior to the October meeting.

2. User Friendly BUDGET. CD provided. Your job is to complete the User Friendly Budget. Complete all sections of UFB 6.2 for the District/COE of your choice. Review and discuss with your mentor prior to the class. Be prepared to report out in TWO minutes and two minutes only what you learned about budgeting in CA using UFB during dinner at the October class. Resource for prior year data: <http://www.ed-data.k12.ca.us>

3. Attend a JPA meeting (workers compensation/property & liability/health and welfare) – not due until January.
4. Attend a Collective Bargaining session (not due until January)
5. Early Birds – get working on your resume (due in January)
6. Finger Tip Facts – be thinking about what should go on your final list. You will be submitting a final finger tip facts in January but it should be a work in progress in the following months.

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.

	October 23 & 24	November 13 & 14	January 8 & 9	February 5 & 6	March 5 & 6	
5:00 to 6:00	Building relationship with HR & Position Control (Don Zimring)	Working dinner - 2 food service presentations	Working Dinner	Working Dinner (review resumes)	Working Dinner	
6:00 to 6:30		Presentations (food service)	Property & Liability (Paula Tanquay- ASCIP)	Technology Presentations	Purchasing & Bidding	
6:30 to 7:00						
7:00 to 7:30						
7:30 to 8:00	Financial Reporting/audit (Francie)	IT Best Practices	What a CBO needs to know about curriculum and Instruction	Employee Evaluations		
8:00 to 8:30						
8:30 to 9:00						
Saturday	Saturday	Saturday	Saturday	Saturday	Saturday	
8:00 to 8:30	Financial Reporting/audit (Francie)	Enrollment projection (Bill McGuire)	Special Education (Francie Heim)	District Issues & Negotiations (School Services)	Applying for the Position of CBO	
8:30 TO 9:00						
9:00 to 9:30	Facilities A-Z (Eric Hall & Lettie Boggs)		Transportation (Bill McGuire)			Worker's Compensation (Terri Prichard - MCJPA)
9:30 to 10:00						
10:00 to 10:30						
10:30 to 11:00						
11:00 to 11:30						
11:30 to 12:00						
12:00 to 12:30	working lunch	Lunch - hand out good to great	Lunch Good to Great	working lunch	working lunch	
12:30 to 1:00	Facilities A-Z	Budget Exercise	Medical Benefits - Teri Ezaki	District Issues & Negotiations (School Services)	Your first 100 days (Bill McGuire & Ron Bennett)	
1:00 to 1:30						
1:30 to 2:00						
2:00 to 3:00					Graduation - lasts until 3:30.	