

CBO Mentor Project Monday Morning Letter  
Class Update #1

To: CBO Mentor Project Participants  
Cohort #7 (as yet unnamed)

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

Date: May 9, 2010

Many thanks to all of you for a great kick-off weekend. A special thank you for the Mothers' Day card – an unexpected and delightful surprise. This letter is longer than usual but contains a great deal of critical information for you as you prepare for the next class.

**IMPORTANT REMINDERS**

Monday Morning ZOOMERANG Survey  
Mentor discussion before next class (official list below)  
Assignments for next class (official list below)  
Mark your calendar for the rest of the dates

Session I	May 7-8 ( <b>12:00 p.m. on Friday</b> )
Session II	June 25-26, 2010
Session III	August 6-7, 2010
Session IV	September 10-11, 2010 (starts at 3:00 Friday)
Session V	October 15-16, 2010 (starts at 3:00 Friday)
Session VI	November 18, 29 & 20 2010 in coordination with <b>CASBO CBO Symposium Newport Beach</b>
Session VII	December 10-11, 2010
Session VIII	January 7-8, 2011 (starts at 3:00 Friday)
Session IX	February 4-5, 2011
Graduation	March 4-5, 2011

It was a pleasure to meet our seventh class of future CBO's. Having graduated six classes of future CBO's, we are once again delighted 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. Who will take up the challenge to be the first class member to know the entire class by first and last names?

Be thinking about your **Class Name**. Names to date: First Class, 2<sup>nd</sup> to None, Joel's Favorite; We Raised the Bar, Fantastic Fourth, Five Star Leaders, and Sixth Cents.

**Joel Montero** (CEO of FCMAT) was not able to be with us on Friday but he was there in spirit. We appreciate that FCMAT provides financial support for this program, but equally grateful for Joel's passion and belief in the program

The Mentor turnout on Friday was the best ever. The handouts for the class contain a great deal of vital information for both participants and mentors and these documents are also available on the google doc site.

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.

Saturday morning started with **Ken Hawkins** and the art of listening. I personally learn something new every year when Ken presents. Another part of the program we look forward to is the **"Strengths"** analysis as well as the "Compete, Compromise, Avoid, Accommodate, Collaborate 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" and Conflict styles are posted on the google site.

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	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 we also realized we needed to focus more 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 valuable advice that you will use in your career as a CBO.

Below are your assignment for June.

### June MENTOR DISCUSSION TOPICS

Discuss your aspirations to be a CBO. Ask your mentor what 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.

Discuss the relationship between business and curriculum & instruction division. How does business support the instructional side of the house?

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 minute. (put your answer in writing and post to the google doc site).

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

## 2. June Written Assignment

Prepare a 200 – 300 word summary that describes your district revenue limit funding. 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://www.cde.ca.gov/fg/aa/pa/pa0910.asp>

For those new to revenue limits, if you need more help and support for this assignment, please contact the instructor, [francieheim@gmail.com](mailto:francieheim@gmail.com) 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 June

1. Come prepared to talk (TWO MINUTES) about student achievement in your district.
2. Attend a board meeting in June where a budget is being presented.  
(Your district, your mentor's district, or another district of your choice).
3. 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 June 25
  - You will be observing his presentation and asking him questions.

# Your Budget Acting Part

Current board member who is known for being rational	Aaron Thornsberry
Continuation principal	Demian Barnett
Board member supported by csea	Brett McFadden
Board member who used to be a teacher in the district but was fired	Cecile Nunley
Former recalled board member	Chris Vaz
Board member who used to be the cbo of the district in 1945	Debra Silva
Soccer mom	Jennifer Stahlheber
Interested parent - head of technology company	Diane Lacombe
Parent of a child with special needs	Harley Robertson
Parent of a child enrolled in gate	Jane Shamieh
High school math teacher	Dennis Snelling
Newspaper reporter (local paper) seasoned veteran of 6 months	Jonathan Allen
INTERESTED PARENT - opposed too school fees	Joyce Lopes
Kindergarten teacher	Kraig Magnussen
Band teacher	Kristofer Pitman
High school football coach	Maria Palmer
CSEA president	Paul Ziegler
CSEA member - new to negotiation team	Susan Junette
CTA President	Stan Machesky
CTA member - new to negotiation team	Tina Tuning
Retiree of the district - former administrator	Thomas Barentson
Cranky curmudgeon who writes weekly letters to the editor	Tom Etchart
Interested parent - CPA	Tommy Welch
Interested parent - CEO of a large company	Veronica Lanto
Owner of local construction company who has not received any work from the district	Wael Elatar
Interested parent willing to run fundraisers to solve all the problems	Gary Kelly
Bill McGuires best friend present for moral support	Barbara Henderson

## FUTURE 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. Detail for the next three classes is shown below.

	2	3	4
	June 25 & 26	August 6& 7	September 10 & 11
3:00 to 5:00		optional - school finance tutorial	School Finance with Ken Hall
5:00 to 6:00	What a CBO needs to know about C&I	Working dinner & activity	Working dinner & activity
6:00 to 7:00		County office Fiscal Oversight (Wendy Benkert)	Financial Reporting - Francie
7:00 to 8:00	Activity		
8:00 to 9:00	Budget Presentation (7:00 to 9:30) (Bill McGuire)	Fiscal Crisis-FCMAT perspective (Joel Montero)	
<b>Saturday</b>	<b>Saturday</b>	<b>Saturday</b>	<b>Saturday</b>
8:00 to 9:00	Activity	Activity	Legal Issues & Contracts (Harold Freiman Lozano Smith)
9:00 to 10:00	School Finance - Revenue (Francie Heim)	School Finance (Francie Heim)	
10:00 to 11:00			Financial Reporting Trend Analysis Francie
11:00 to 12:00			
12:00 to 1:00	Lunch Activity	Lunch Activity	working lunch
1:00 to 2:00	Fiscal Update - Kevin Gordon	Leadership	Budget Bill McGuire
2:00 to 3:00	School Finance (Francie Heim)	Budget Presentation Part 1 Bill McGuire	