

CBO Mentor Project Monday Morning Letter  
Class Update #2

To: CBO Mentor Project Participants  
Cohort #7 (as yet unnamed – Magnificent Seven?)

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

Date: June 28, 2010

Congratulations – you are the first class to achieve “name recognition” by the second session. **Paul Ziegler** was able to walk around the room and name all of his classmates. Nice job!

**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 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, 19 & 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

We look forward each year to a new group of students and are never quite sure what to expect in terms of class dynamics. I can see that it is going to be a fun year. Continue to work on your **Class Name**. The sooner you have your name, the sooner we can order your class shirts.

We missed Bill McGuire on Friday night and we will reschedule the budget presentation. However, the good news is that we had more time with **Dr. Linda Hauser** and it was time well spent. Linda shared her passion for education and her belief that all children can learn. The “barbell exercise” was a memorable way of showing us how systems create failure. It was a lesson in leadership that is applicable to education systems as well as many other leadership situations you will encounter as a CBO.

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, I 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.

#### August Mentor Question & 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 to the google site.
- Discuss with your mentor strategies relative to cash flow, cash management, cash loans.
- 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? *Note – put your interview question answer in writing and post to google site.*

## 2. August Written Assignment

Prepare a 200 – 300 word summary that describes Class Size Reduction Funding in 2010-11. **Describe it as though you were including the description in a budget document.**

From last month - Revise your revenue limit document based on any new information you heard in class on Saturday.

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.**

### Assignments due for August

1. Come prepared to talk (TWO MINUTES) about student achievement in your district (if you have NOT been called on yet)
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 at the August session (on Saturday)
  - You will be observing his presentation and asking him questions.
3. User Friendly BUDGET. ~~CD provided.~~  
Go online to School Services of CA.  
[http://www.sscal.com/software\\_technology.cfm?action=software&contentID=89](http://www.sscal.com/software_technology.cfm?action=software&contentID=89)  
(Go to School Services of CA (sscal.com). Select: Services and Products. Select: software & technology. Select: user friendly budget. It takes up to 30 minutes to download.

Your job is to complete the User Friendly Budget (UFB). Complete all sections of UFB for the District of your choice. You do NOT have to fill in 10 years of prior year data – only three years are required.

If you are a county office or charter, select a school district that interests you. Review and discuss with your mentor prior to the class. Due by the October 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>

4. Leadership assignment – TBD. You may have a reading assignment over the summer. We will provide those details (early in July) in a separate communication.
5. Attend a JPA meeting (workers compensation/property & liability/health and welfare) – not due until January.
6. Start work on your unique “Fingertip Facts”. You will keep adding to this document as the class progresses and your final document is due at the end of the program.

# 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 McGuire's 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.

	August 6& 7	September 10 & 11	October 15 & 16
	optional - school finance tutorial	School Finance with Ken Hall	Debt Financing Lori Raineri
5:00 to 6:00	Working dinner & activity	Working dinner & activity	Working dinner & activity
6:00 to 7:00	County office Fiscal Oversight (Wendy Benkert)	Financial Reporting - Francie	Financial Reporting Francie
7:00 to 8:00	Fiscal Crisis-FCMAT perspective (Joel Montero)		
8:00 to 9:00			
<b>Saturday</b>	<b>Saturday</b>	<b>Saturday</b>	<b>Saturday</b>
8:00 to 9:00	Activity	Legal Issues & Contracts (Harold Freiman Lozano Smith)	Workers Comp (Terri Prichard)
9:00 to 10:00	School Finance (Francie Heim)		
10:00 to 11:00		Financial Reporting Trend Analysis Francie	Budget Bill McGuire
11:00 to 12:00			
12:00 to 1:00	Lunch Activity	working lunch	working lunch
	Leadership	Budget Bill McGuire	Budget Bill McGuire
1:00 to 2:00			
2:00 to 3:00	Budget Presentation Part 1 Bill McGuire		