

**FCMAT  
CBO  
Mentor  
Program**



*A partnership of*

**FCMAT  
SSC  
CCSESA  
BASC  
CASBO**

## FCMAT CBO Mentor Program

*A Partnership of*

**Fiscal Crisis and Management Assistance Team (FCMAT)**

**School Services of California (SSC)**

**California Association of School Business Officials (CASBO)**

**California County Superintendents Educational Services Association  
(CCSESA)**

**Subcommittee: Business and Administration Steering Committee (BASC)**

## **Mentor Application 2019-20 16<sup>th</sup> Cohort**

**Fiscal Crisis & Management Assistance Team  
1300 17<sup>th</sup> Street – CITY CENTRE  
Bakersfield CA 93301-4533**

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## **FCMAT CBO Mentor Program**

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## Purpose

The FCMAT Chief Business Officials (CBO) training program aims to produce qualified California school district CBOs. This one-year program provides classroom training that takes place in 10 sessions (Friday afternoon and evening, Saturday). Mentors are qualified and experienced CBOs, typically with 10 years or more of experience. This program is unique because of the following four major components:

- 1) Each participant is teamed with their own mentor
- 2) Participants are nominated and selection is competitive
- 3) Training involves hands-on experience
- 4) Tuition is at no cost to participants  
(FCMAT underwrites the cost of this professional learning activity)

The FCMAT CBO Mentor Program is a joint endeavor of FCMAT, SSC, CCSESA, BASC, and CASBO. It is our intent through interagency collaboration to help school districts throughout California fill CBO vacancies with qualified CBOs. We developed with CASBO a link to their CBO Certification program with the intent that a successful participant may receive CASBO CBO certification, depending on their mentor evaluation in coordination with CASBO's certification and approval process.

The program focuses on developing strong effective leadership skills. Participants will improve their understanding of fundamental issues that drive school business policies in each major functional area, including school finance, accounting, budgeting, facilities, maintenance and operations, transportation, contracts and procurement, risk management, food service, charter schools, and others. The curriculum is updated annually to reflect the current functions and responsibilities required of a district CBO.

We encourage applicants statewide to apply for this limited professional learning opportunity. A typical CBO Mentor cohort has 25 participants from all regions of California and with various backgrounds ranging from directors of business services to school principals to individuals in private industry seeking to transition into school business leadership positions.

As a mentor, your role is to support our future CBOs in their journey and share your wisdom and experience. FCMAT is pleased to present this professional learning activity in relationship with other professional trainings focusing on fiscal accountability.

Sincerely,



Michael H. Fine, Chief Executive Officer  
Fiscal Crisis and Management Assistance Team

# FCMAT CBO Mentor Program Implementation Timeline Mentor Selection 2019 - 2020

## I. Application Timeline

- Application and resume (for new mentors only – returning mentors do not need to reapply)
- **Friday, December 14, 2018 by 5 p.m.**

- E-mail application and resume to [CboMentorMaster@gmail.com](mailto:CboMentorMaster@gmail.com).

Questions? Contact: Shayleen Harte, Deputy Executive Officer  
1300 17<sup>th</sup> Street, City Centre  
Bakersfield, CA 93301  
(661) 636-4670, [sharte@fcmat.org](mailto:sharte@fcmat.org)

**IMPORTANT: If you do not receive a confirming email from FCMAT that your application has been received, it is the Mentor’s responsibility to call Shayleen Harte (FCMAT) at (661) 636-4670 and resolve email transmission issues that may be affecting FCMATs ability to receive your application package.**

## II. Selection Timeline

- January 2019                      Selection of participants
- January/February 2019       Selection of mentors
- February 2019                    Notification to selected mentors

## **FCMAT CBO Mentor Program Primary Qualifications for Mentors**

- ✓ Currently holds position of Chief Business Official or is actively involved as a retired CBO
- ✓ Extensive experience as a CBO (10 years or more of experience preferred)
- ✓ Hands-on experience in all facets of school business operations
- ✓ Holds a degree in business-related field. CBO certification, or demonstrated workplace experience.
- ✓ Demonstrated performance developing business personnel
- ✓ Commitment for minimum of 8-10 hours per month of one-on-one mentoring with candidate
- ✓ Able to provide work study supervision to candidate in accordance with curriculum guidelines

**FCMAT CBO Mentor Program**  
**Mentor Application Form**  
**Required if not previously a Mentor in this program**  
**2019-20**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Previous Title, if retired: \_\_\_\_\_

County of Residence: \_\_\_\_\_

No. of Years as CBO: \_\_\_\_\_

(COE / District / Community College)

Agency name: \_\_\_\_\_

Work address: \_\_\_\_\_

Work phone: \_\_\_\_\_

Home address: \_\_\_\_\_

Home phone: \_\_\_\_\_

Email address: \_\_\_\_\_

Male       Female

1. If still employed, does your superintendent and/or school board support this mentor position?  
 Yes    No    N/A
  
2. Do you commit to a minimum of 8-10 hours per month of one-on-one mentoring with the selected candidate?  
 Yes    No

Signature \_\_\_\_\_

## FCMAT CBO Mentor Program Mentor Responsibilities

### Training Sessions:

(Required\*)

(Requested\*\*)

- \* Attendance at One of the Following Two Mentor Orientation Sessions
  - April 15, 2019 Orientation at CASBO conference in San Diego, 3:30 to 4:30 p.m.
  - May 3, 2019 First Meeting Orientation in Sacramento – 11 a.m. to 12 noon.
- \*\* Meet and Greet, April 15, 2019
  - CASBO Annual Conference – San Diego, CA
  - Meet and Greet for all Participants and Mentors and Alumni, 4:30 to 6:30 p.m.
- \*\* November 2019 – at the CASBO CBO Symposium
  - Mid-year Evaluation: Mentors meet with Michael Fine to provide input on how to continuously improve the program.
- \*\* March 7, 2020 - Final Class/Graduation/Presentation of Certificates

### *General Responsibilities:*

- Share your wisdom and experience generously.
- Be available to mentor and provide guidance and support to participant via email, phone, or in person. Participants have monthly questions to review with their mentor as well as various assignments. Review the assigned projects and provide feedback to the participant.
- Following each session, read the “Monday morning letter” forwarded by the CBO mentor coordinator that provides details on the areas of focus, mentor assigned questions, and ongoing assignments.
- Keep in contact with the CBO mentor coordinator regarding participant’s progress by completing the monthly mentor assignment email/survey.
- Complete CBO Candidate Assessment document and make a recommendation regarding CBO certification.

### *Participate in the following evaluation process:*

- Provide objective evaluation of participant’s progress. A formal evaluation of participants is completed at the end of the program; however, mentors should provide feedback to participants throughout the program. We highly recommend using the CBO Candidate assessment document to provide an informal evaluation of the participant’s progress in November.
- Provide ongoing feedback through the monthly email survey.
- Provide formal feedback in November at the mid-year evaluation meeting with Michael Fine. All mentors are strongly encouraged to participate.

### *Stipends:*

- Mentors will receive a one-time stipend of \$1,750 to be paid in March 2019. Stipend includes travel costs.

# **FCMAT CBO Mentor Program Training Schedule 2019-20**

**CASBO Annual Conference • Sacramento  
April 15, 2019  
4:30 to 6:30 p.m. Meet & Greet Social**

<b>Session I</b>	<b>May 3 &amp; 4, 2019*</b>
<b>Session II</b>	<b>June 21 &amp; 22, 2019</b>
<b>Session III</b>	<b>August 9 &amp; 10, 2019</b>
<b>Session IV</b>	<b>September 6 &amp; 7, 2019</b>
<b>Session V</b>	<b>October 4 &amp; 5, 2019</b>
<b>Session VI</b>	<b>November 2019, Dates &amp; Location TBD (in conjunction with CASBO CBO Symposium)</b>
<b>Session VII</b>	<b>December 6 &amp; 7, 2019</b>
<b>Session VIII</b>	<b>January 3 &amp; 4, 2020**</b>
<b>Session IX</b>	<b>February 7 &amp; 8, 2020</b>
<b>Session X</b>	<b>March 6 &amp; 7, 2020 Mentors are invited to Graduation</b>

\* *First session starts at noon with lunch and welcome on May 3, 2019.*

\*\* *To be held in Southern California. Location TBD.*

Trainings take place from 3 to 9 p.m. on Friday and from 8 a.m. to 3 p.m. on Saturday. Participants are offered optional in-depth sessions from 1 to 3 p.m. on Friday. All participants typically attend the optional sessions.

All sessions except the November and January sessions take place at the Hilton Garden Inn Sacramento/South Natomas, 2540 Venture Oaks Way, Sacramento, CA 95833.

Attendance at all sessions is mandatory for participants. One absence (with appropriate make-up) is allowed. Failure to attend may result in a participant being dropped from the program. Mentor attendance requirements and recommendations are as previously listed.