

# FCMAT CBO Mentor Program

## *Executive Report*

April 2017 – March 2018 • Fourteenth Cohort



### **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)

PRESENTED TO THE FCMAT BOARD OF DIRECTORS, OCTOBER 14, 2018



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## Acknowledgements

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- The joint endeavors of the following organizations along with FCMAT in creating and sustaining the FCMAT CBO Mentor Program: School Services of California (SSC), the California County Superintendents' Educational Services Association (CCSESA), the Business and Administration Steering Committee (BASC), and the California Association of School Business Officials (CASBO).
- FCMAT CBO Mentor core instructors Francie Heim, retired deputy superintendent of the El Dorado County Office of Education, and Bill McGuire, deputy superintendent of Twin Rivers Unified School District and former superintendent of the St. Helena Unified School District, who provided direct instruction, developed curriculum, assisted in scheduling, and provided mentoring to all participants.
- School Services of California and their team, who provided training on leadership qualities required of a CBO and how to apply and interview for a CBO position.
- CASBO for inviting the FCMAT CBO Mentor Program participants to attend the CASBO CBO Symposium in November 2017, and School Innovations and Achievement for underwriting the CBO Mentor Program participant registration cost.
- The 32 FCMAT CBO mentors, who provided support and assistance to the newly graduated aspiring CBOs from the cohort of participants.
- The 32 participants, who completed the rigorous training program. We congratulate them and support their efforts to achieve their career objectives.

It is with great sadness that FCMAT recalls the passing, shortly after the last session of this CBO Mentor Program cohort, of Ron Bennett, President and CEO of School Services of California. Ron was a strong presence in this and many previous cohorts and a valued colleague, mentor and friend to many in California's educational agencies. His experience, insight and wisdom were highly valued. He is remembered with gratitude and fondness.



## Introduction

The Fiscal Crisis and Management Assistance Team (FCMAT) is an independent external public agency that assists school districts with fiscal and management issues as outlined in the California Education Code. FCMAT provides professional development activities to improve the fiscal expertise of local educational agencies. The FCMAT Chief Business Official (CBO) Mentor Program is one of the professional development activities initiated by FCMAT in partnership with other educational agencies to improve school district fiscal accountability.

For many years there has been a serious shortage of qualified and trained business officials to provide effective school district fiscal management. With school funding having undergone a major transformation with the Local Control Funding Formula, the need for strong CBO leaders continues.

The FCMAT CBO Mentor Program is a systematic, structured professional development program. Participants learn the role and functions of a CBO for a California school district. They complete interactive exercises and activities, increase their skills and knowledge, and put proven techniques into practice. Instruction consists of both in-class assignments and homework. Ten two-day class sessions take place over a 12-month period; each session is conducted on a Friday afternoon/evening and all day Saturday.

Experienced CBOs practicing in or recently retired from California school districts are selected as mentors for the aspiring CBO participants. Mentors provide support and direction throughout the training period and thus constitute a valuable component of the FCMAT CBO Mentor Program.

2017-18 was the 14th year of the program. Each cohort develops as a team, and participants select a class name. The names, dates, and number of graduates for all FCMAT CBO Mentor cohorts completed to date are as follows:

Cohort Name	Year	Graduates
First Class	2004-05	19
Second to None	2005-06	24
Joel's Favorites	2006-07	27
Fantastic Fourth	2007-08	25
Five Star Leaders	2008-09	23
Six Cents	2009-10	25
Magnificent Seventh	2010-11	23
Elite8	2011-12	23
Nine Lives	2012-13	23
Perfect 10	2013-14	29
11th Hour	2014-15	28
Dynamic Dozen	2015-16	26
13th Alliance	2016-17	30
Unforgettable 14	2017-18	32

As of March 2018, 357 FCMAT CBO Mentor participants have graduated from the program.

Cohort 15 (Nickel and a Dime) started in May 2018 and has 26 participants and mentors. Although instructors and mentors enjoyed having 32 participants in Unforgettable 14, the program is working to return to its original class size goal of approximately 25 participants. The

selection process continues to be competitive. Many strong candidates were not selected but were encouraged to reapply for cohort 16.

FCMAT welcomes inquiries and all comments to help improve and strengthen the FCMAT CBO Mentor Program. Please do not hesitate to contact us at (661) 636-4308.

Sincerely

A handwritten signature in black ink, reading "Michael H. Fine". The signature is written in a cursive style with a large, stylized "M" and "F".

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

# The 2017-18 FCMAT CBO Mentor Program

## Program Overview

The FCMAT CBO Mentor Program is an innovative one-year professional training program designed to produce qualified school district chief business officials. Instruction is provided by experienced, practicing or recently retired CBOs, many of whom are leaders in school business. Class size is limited, with 25 students considered ideal.

The program curriculum covers current finance issues, best practices, and legal requirements for California schools. The sequence of instruction includes a broad, deep and complete perspective on the role of a CBO.

The program is funded by FCMAT using professional development funds designated for training qualified school district business officials.

## Objective

1. To provide an innovative training experience to potential CBO candidates throughout the California public school system.

## Main Desired Outcomes

1. An understanding by the candidate of fundamental issues that drive school business policies in each of the following major functional areas:
  - student achievement
  - student programs, including charter schools
  - finance, accounting and budgeting
  - facilities development
  - maintenance, operations and transportation
  - contracts and procurement
  - legal issues and risk management
2. Specific demonstrated knowledge and application of school business principles and processes in district operations.
3. Demonstrated leadership and communication skills.

## Curriculum Methods

1. Work-study applied learning through project assignments, with support from assigned mentors.
2. In-class discussions and presentations on school business topics.

## Curriculum Delivery

1. Monthly instruction is provided in a classroom setting.
2. Instruction is provided by practicing professionals employed in California school districts, county offices of education, nonprofit organizations specializing in school finance, and private firms providing services to education agencies.
3. Participants are required to complete assignments outside of class time.

A program brochure is available online and linked to [here](#).

## Why the FCMAT CBO Mentor Program?

California schools have recently undergone a time of great change with a shift to the K-12 Local Control Funding Formula (LCFF) and Local Control and Accountability Plan (LCAP). The need for CBO leaders trained in financial and operational best practices has never been greater. Veteran CBOs continue to retire in large numbers. There continue to be a number of state administrators appointed to govern school districts that have received state emergency funds to balance their budgets, as well as a number of fiscal advisors appointed to districts by county offices of education under Assembly Bill (AB) 1200.

In keeping with its core mission to support school districts, FCMAT has worked to develop the FCMAT CBO Mentor Program as an effective and efficient training model to help meet the need for qualified CBOs.

## Celebrating Success

Over the past 14 years, an increasing number of graduates from the FCMAT CBO Mentor Program have been hired for CBO and director positions throughout the state. County offices of education (COEs) have benefited; many of the top leadership roles are held by FCMAT CBO Mentor Program alumni, including the following:

### CBO Name

Tad Alexander  
Jeff Napier  
Robbie Montalbano  
Gail Osborne  
Tom Snyder  
Kate Lane  
Renee Hendrick  
Martin Fregoso  
Lisa Cavin  
Richard De Nava  
Scott Anderson  
Denise Porterfield  
Mary Hart  
Tommy Welch  
Barbara Henderson

### County Office

Butte COE  
Del Norte COE  
El Dorado COE  
Colusa COE  
Inyo COE  
Marin COE  
Orange CDE  
Placer COE  
Plumas COE  
San Bernardino COE  
San Joaquin COE  
San Mateo COE  
Santa Cruz COE  
Solano COE  
Sutter COE

The program has also prepared individuals for the next level of county office leadership: the table below shows the FCMAT CBO Mentor Program alumni who are now directors or managers of business in COEs.

COE Director Name	County Office
Julie Brunson	Calaveras COE
Diane Lacombe	El Dorado COE
Roslynne Manasala Smith	El Dorado COE
Gabriel Hall	Fresno COE
Keith Crafton	Los Angeles COE
Patty Banuelos	Orange CDE
Chris Lombardo	Orange CDE
Gary Stine	Orange CDE
Howard Marinier	Orange CDE
Laura Lilley	Placer COE
Judy Kershaw	Santa Clara COE
Kristin Armatis	San Diego COE
Peter Foggato	San Joaquin COE
Terrell Martinez	San Joaquin COE
Kathryn Rusk	San Joaquin COE
Denise Cora	Santa Barbara COE
Sandi Madera	Stanislaus COE
Aaron Heinz	Sutter COE
Diane Baumhover	Tuolumne COE

A significant number of the program's graduates have been promoted to CBO positions over the years. Most graduates have taken on additional job responsibilities in their current district, been promoted within their current district, or have taken a job with a higher level of responsibility. In most instances, that next position was a CBO position. The table below is a partial list of program graduates in top leadership positions throughout the state.

First Cohort

Name	Title	LEA	Region
Donna Caperton	CBO	Vista USD	Southern CA
Karl Christensen	CBO	Santee SD	Southern CA
Grace Garner	CBO	Garvey SD	Southern CA
John Von Flue	Chief Analyst	FCMAT	Central

## Second Cohort

Name	Title	LEA	Region
Bruce Colby	CBO	Davis Joint USD	Northern CA
Carolyn Corvera	CFO	Chaffey Joint Union HSD	Southern CA
Eric Dill	CBO	Santa Clara USD	Bay Area/Other
Roseanna Jeng	CBO	Saratoga USD	Bay Area/Other
Janelle Mehling	CBO	Sierra USD	Southern CA
Nancy Pfeiffer	CBO	Campbell UHSD	Bay Area/Other
Brad Rohrbach	Director of Fiscal	Porterville USD	Central

## Third Cohort

Name	Title	LEA	Region
Matt Beecher	CBO	Santa Maria Bonita SD	Southern CA
Song Chin-Bendib	CBO	Pacific Grove USD	Bay Area/Other
Jennifer Fusano	CBO	Placerville SD	Northern CA
Robert Groeber	CBO	Visalia USD	Central
Susan Kinder	CBO	Livermore Valley USD	Bay Area/Other
Sean Martin	CBO	Rescue USD	Northern CA
John Mendiburu	Superintendent	Rosedale Union SD	Central
Jennifer Noga	Intervention Specialist	FCMAT	Central
Cindy Peterson	Superintendent	Gateway Charter	Northern CA
Jeff Potter	Intervention Specialist	FCMAT	Central
Liann Reyes	CBO	North Monterey County USD	Bay Area/Other
Jerry Stratton	CBO	Salinas City ESD	Bay Area/Other
Tim Zearley	CBO	Modesto City Schools	Central

## Fourth Cohort

Name	Title	LEA	Region
Jordan Aquino	CFO	Ontario-Montclair SD	Southern CA
Melody Canady	CBO	Santa Monica-Malibu USD	Southern CA
Jayne Christakos	CBO	San Bernardino City USD	Southern CA
Christina Giraldo	CBO	Sierra Sands USD	Central
Linda Himmel	CBO	Gold Oak SD	Northern CA
Lori Isom	CBO	Central SD	Southern CA
Gretchen McReynolds	CBO	Vallecito Union SD	Northern CA
Anthony Soria	CFO	Tustin USD	Southern CA

## Fifth Cohort

Name	Title	LEA	Region
Leslie Barnes	CBO	Pomona USD	Southern CA
Kassandra Booth	CBO	Calaveras USD	Northern CA
Shawn Cabey	CBO	Westside SD	Southern CA
Filipinas Duldulao	Director of Fiscal	San Juan USD	Northern CA
David Flores	CBO	Shasta Union HSD	Northern CA
Melody Glaspey	CBO	Eureka USD	Northern CA
Brian Hawkins	CBO	Victor Valley Union HSD	Southern CA
Karen Kimmel	CBO	Las Virgenes USD	Southern CA
Christine Statton	Vice President	College of the Sequoias	Central
Jeff Trader	CFO	Newport Mesa USD	Southern CA
Peter VanBuskirk	Director of Fiscal	Palm Springs USD	Southern CA
Jason Willis	Director	West-Ed	Bay Area/Other

## Sixth Cohort

Name	Title	LEA	Region
Helen Bellonzi	Director of Fiscal	Pajaro Valley USD	Bay Area/Other
Carolyn Chow	CBO	San Mateo-Foster City SD	Bay Area/Other
Linda Fabre	Assistant Supt., HR	San Bernardino COE	Southern CA
Debbie Fry	Director SSC	School Services of CA	Northern CA
Jennifer Goodner	Budget Manager	Fortuna ESD	Northern CA
Yancy Hawkins	CBO	Novato USD	Bay Area/Other
Gaby Hellier	CBO	Burlingame SD	Bay Area/Other
Kathryn Perkins	CBO	Charter Oak USD	Southern CA
Scott Price	CBO/CFO	Los Angeles USD	Southern CA
Candace Reines	CBO	Perris Union HSD	Southern CA
Todd Rivera	CBO	Tahoe Truckee USD	Northern CA
Fred Van Vleck	Superintendent	Eureka City Schools	Northern CA

## Seventh Cohort

Name	Title	LEA	Region
Thomas Barentson	CBO	Galt Joint Union ESD	Northern CA
Tina Douglas	CBO	San Dieguito USD	Southern CA
Wael Elatar	CBO	El Monte Union HSD	Southern CA
Joyce Lopes	Vice President	Sonoma State University	Northern CA
Kraig Magnussen	CBO	Kerman USD	Central
Brett McFadden	Superintendent	Nevada Joint Union HSD	Northern CA
Jane Shamieh	Superintendent	Vacaville USD	Northern CA
Debra Silva	CBO	Hart-Ransom SD	Central
Dennis Snelling	CBO	Roseville ESD	Northern CA
Jennifer Stahlheber	CBO	Vacaville USD	Northern CA
Aaron Thornsberry	CBO	Gateway Charter	Northern CA
Chris Vaz	CBO	Washington USD	Central
Paul Ziegler	CBO	Eureka City Schools	Northern CA

## Eighth Cohort

Name	Title	LEA	Region
Virginia Alvarez	CBO	Montecito ESD	Southern CA
Diane Deshler	CBO	Lafayette USD	Bay Area/Other
Andrea Dodson	Intervention Specialist	FCMAT	Central
Lisa Donaldson	CBO	Mother Lode USD	Northern CA
Nick Heinlein	CBO	Saugus USD	Southern CA
Robert McEntire	CBO	Covina-Valley USD	Southern CA
Wendy Richard	CBO	San Bruno Park SD	Bay Area/Other
Mark Schiel	CBO	San Marcos USD	Southern CA
Robin Schmitt	CBO	Brentwood Union SD	Bay Area/Other
Jeff Starr	CBO	Huntington Beach Union HSD	Southern CA
Mark Stevens	Superintendent	Borrego Springs USD	Southern CA
Lori van Gogh	CBO	Sunnyvale ESD	Bay Area/Other
Christine Walker	Superintendent	Hueneme ESD	Southern CA

## Ninth Cohort

Name	Title	LEA	Region
Jean Aldrete	CBO	Brea Olinda SD	Southern CA
Julie Bautista	CBO	Acalanes USD	Bay Area/Other
David Bennett	Director of Fiscal	Fullerton Joint Union HSD	Southern CA
Keith Butler	CBO	Palos Verdes Peninsula USD	Southern CA
Ryan Di Guilio	CBO	Fullerton USD	Southern CA
Richard Holash	CBO	Buena Park SD	Southern CA
Erin Lillibridge	CBO	Granada Hills Charter HS	Southern CA
Susana Lopez	CBO	Alvord USD	Southern CA
Greg Medici	CBO	San Ramon Valley USD	Northern CA
Cindy Peterson	CBO	Oakley Union ESD	Central
Luci Rogers	CFO	Hayward USD	Northern CA
Matthew Schulenberg	CBO	Apple Valley USD	Southern CA
Nelly Yang	CFO	Evergreen SD	Bay Area/Other

## Tenth Cohort

Name	Title	LEA	Region
Steven Eichman	CBO	Ravenswood SD	Bay Area/Other
Vina Guzman	Director	Natomas USD	Northern CA
Alvina Keyser	CBO	Lammersville SD	Northern CA
Victoria Knutson	Director of Fiscal	Morgan Hill USD	Bay Area/Other
Ed Manansala	County Superintendent	El Dorado COE	Northern CA
Scott Martin	CBO	Centralia SD	Southern CA
Mike Mathiesen	CBO	Mountain View-Los Altos Union HSD	Bay Area/Other
LeAnn Nowlin	CBO	Golden Plains USD	Central
Sunny Okeke	Director of Fiscal	Compton USD	Southern CA
David Olney	Superintendent	Hesperia USD	Southern CA
Kirsten Perez	CBO	Morgan Hill USD	Northern CA
William Pickering	CBO	Bonsall USD	Southern CA
John Quinto	CBO	Sacramento City USD	Bay Area/Other
Donnie Salamanca	CBO	Coronado USD	Southern CA
Ami Shackelford	CFO	Encinitas USD	Southern CA
Matthew Shipley	Superintendent	Hart-Ransom SD	Central
Rebecca Thomas	CBO	Greenfield Union SD	Central
Trevor Walker	CBO	Muroc Joint USD	Southern CA

## Eleventh Cohort

Name	Title	LEA	Region
Kristi Blandford	Director of Fiscal	Folsom Cordova USD	Northern CA
Erin Garcia	CBO	Lakeside USD	Southern CA
Alan Giles	CBO	Corono-Norco USD	Southern CA
Mike Henkel	CBO	Robla SD	Northern CA
Nikki Herring	Director of Fiscal	Salinas City SD	Bay Area/Other
Wanda Holden	CBO	Gravenstein USD	Northern CA
Robert Marical	CBO	Cotati Rohnert Park	Northern CA
Amanda Phillips	CBO	Escondido Union HSD	Southern CA
Matt Phillips	Director SSC	School Services of CA	Northern CA
Kristen Pifko	Director	Ventura JPA	Southern CA
Ryan Pinkerton	CBO	San Luis Coastal USD	Southern CA
Derek Pinto	CBO	John Swett USD	Bay Area/Other
Richard Ruiz	Director of Fiscal	Kern HSD	Central
Molly Schlange	CBO	University Preparatory School	Northern CA
Ahmad Sheikholeslami	CBO	Menlo Park City SD	Bay Area/Other
Thoraia Soliman	Director of Fiscal	Huntington Beach SD	Southern CA

## Twelfth Cohort

Name	Title	LEA	Region
Corbett Elsen	CBO	Tamalpais Union HSD	Northern CA
Michael R. Hodson	CBO	Marysville Joint USD	Northern CA
Rick Jensen	CBO	Cucamonga SD	Southern CA
Melissa Mercado	CBO	Dixon USD	Northern CA
Silvia Montejano	CBO	Rio Bravo-Greely Union ESD	Central CA
Rudolph Ramirez	CBO	Scotts Valley USD	Bay Area/Other
Mario Rodriguez	Associate Vice Chancellor	Los Rios CCD	Northern CA
Manoj Roychowdhury	CBO	Santa Ana USD	Southern CA
Susan Rutledge	CBO	Clovis USD	Central
Dana Smith	Director of Fiscal	South Pasadena USD	Southern CA
Philippa Townsend	CBO	Capistrano USD	Southern CA
Joan Velasco	CBO	Fullerton Joint Union HSD	Southern CA

## Thirteenth Cohort

Name	Title	LEA	Region
Lizett Aguilar	CBO	Gustine USD	Central
Karyl Brandford	Director of Fiscal	Manhattan Beach USD	Southern CA
Manuel Cardoso	Director of Fiscal	Norwalk-La Mirada USD	Southern CA
Arelis Garcia	CBO	Madera USD	Central
Penni Harbauer	CBO	Beaumont USD	Southern CA
Amer Iqbal	Director of Fiscal	Los Banos USD	Southern CA
Bradley Johnson	CBO	Rancho Santa Fe SD	Southern CA
Janet King	Director of Fiscal	San Bernardino USD	Southern CA
Veronica Moreno	CBO	Winters Joint USD	Northern CA
Gabe Moulaison	CBO	Hollister SD	Bay Area/Other
Brad Pawlowski	CBO	Paso Robles Joint USD	Central
Jordan Reeves	Superintendent	Gridley USD	Northern CA
Cori Shields	CBO	Lassen Union HSD	Northern CA
Mike Thomson	CBO	Hope School District	Southern CA
Raenel Toste	CBO	Newcastle ESD	Northern CA
Amari Watkins	Director of Fiscal	Sacramento City USD	Northern CA

## Fourteenth Cohort

Name	Title	LEA	Region
Gretchen Bergstrom	Assistant Superintendent	Sulphur Springs SD	Southern CA
Heather Brown	CBO	Grant ESD	Northern CA
Rosa Cardona	Director of Fiscal	Kings Canyon USD	Central
Mei Chan	Director of Fiscal	New Haven USD	Bay Area/Other
Mark Chavez	Director	Oakland USD	Bay Area/Other
Kevin Emenaker	Director	Alvord USD	Southern CA
Dalia Gadelmawla	Director of Fiscal	Corona-Norco USD	Southern CA
Norma Gonzales	Asst Supt., HR	Pittsburg USD	Bay Area/Other
Tom Gray	Director of Fiscal	Pleasanton USD	Bay Area/Other
Latasha Jamal	Director of Fiscal	Moorpark USD	Southern CA
Kilee Lane	Director of Fiscal	Washington USD	Northern CA
Mary Navas	Director of Fiscal	Scotts Valley USD	Bay Area/Other
Drew Passalacqua	Assistant Superintendent	West Covina USD	Southern CA
Delores Perley	CFO	San Dieguito Union HSD	Southern CA
Rob Pierce	Deputy Superintendent	Elk Grove HSD	Northern CA
Arleen Sanchez	CBO	Lake Elsinore USD	Southern CA
Tim Stowe	Deputy Superintendent	Torrance USD	Southern CA
Eugenio Villa	CBO	Inglewood USD	Southern CA

## What Makes the FCMAT CBO Mentor Program Different?



Several programs currently provide training and professional development for new and aspiring CBOs. However, the FCMAT CBO Mentor Program has the following unique strengths that make it one of the most respected programs in California:

Participants Eugenio Villa and Heather Brown present financial information.

1. Each participant must be nominated and screened by the steering committee based on identified criteria.
2. Each participant is assigned a mentor who is committed to the participant's success. One-on-one support is provided throughout the one-year program.
3. One-on-one mentors must meet designated criteria and be approved by the steering committee. Mentors typically have 10 or more years of experience as a successful CBO in the California public school system.
4. Classes are designed to be interactive. Participants are required to complete several major projects.
5. The classes have core instructors who oversee the class to ensure that:
  - Presenters are on target and provide consistent curriculum.
  - The participants are engaged in learning. Core instructors determine if any changes are needed to keep the class on track.
  - The mentor helps the participant prepare for class and reviews the various assignments.
6. No registration or tuition fee is required of participants.
7. Evaluation is an ongoing process.
8. Participants may elect to earn up to nine semester units of university credit through Fresno Pacific University. The cost in 2017-18 was \$75 per unit.

### Mentor Experience and Commitment

Perhaps the greatest strength of the FCMAT CBO Mentor Program is the experience of the mentors, who provide one-on-one support to participants. Participants are directed to have an in-depth discussion with their mentor prior to each class, and a series of targeted questions is provided. Mentors are also asked to review all assignments and provide feedback to the participants. The intensive mentor component sets the FCMAT CBO Mentor Program apart from other CBO training programs.

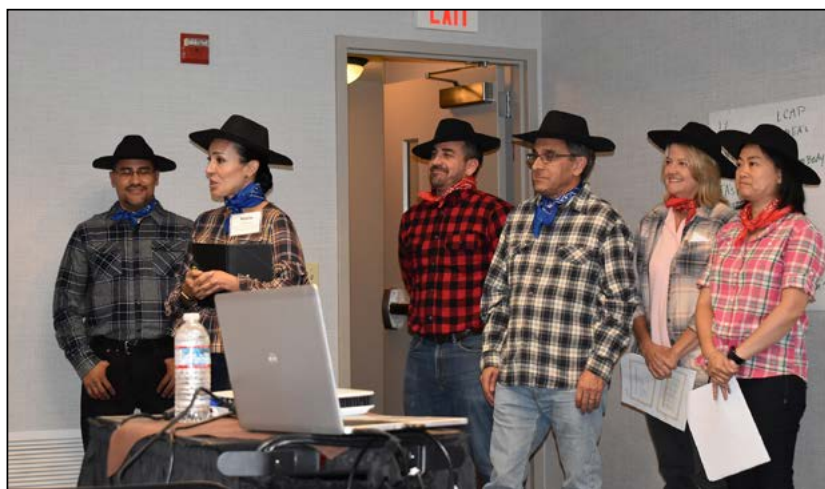
Because of the longevity of the program, its leaders are now able to call on previous graduates to serve as mentors in the program.

## Participant Qualifications

Applicants for current CBO openings in California come with a variety of skills and talents. The program seeks to create a diverse class, with participants coming from school business, facilities and operations, instruction, charter schools, and private industry.

A successful candidate for the FCMAT CBO Mentor Program should currently have or show potential in the following areas:

- Involved in some facet of school business (desirable but not required)
- School finance
- Computer literacy, spreadsheet software
- Sensitivity to confidential issues
- Logical thinking skills
- Analytical abilities
- Facilitation skills
- Leadership
- Interpersonal skills; ability to communicate well with others
- Career objective to become a fully-qualified CBO



Participants (L-R) Mark Chavez, Marie Espinoza, J.J. Fotia, Tom Gray, Gretchen Bergstrom and Mei Chan give a budget presentation. Teams are encouraged to be creative, and the results are always entertaining.

## Course Completion Requirements

Participants are engaged in rigorous study over the course of a year. Successful graduation and recommendation from the program require intense dedication. Requirements for completion are as follows:

1. Completion of monthly work-study assignments reflecting strategic and technical competencies in the functional area of school business.
2. Attendance at 10 training sessions (one excused absence is allowed, but participants are asked to attend a make-up session during the next cohort).
3. Positive evaluation from mentor and core instructors.
4. Satisfactory completion of all assignments and group projects.

## Comments from Participants

Several of the 32 participants who successfully completed the 14<sup>th</sup> FCMAT CBO Mentor Program have already advanced in their career objectives. All participants indicated that the program exceeded their expectations, made them more qualified in their present positions, and prepared them for professional advancement.

Following are just a few of the many positive comments received from cohort 14 participants upon graduation:

*Thank you so much to the team for the great year and for sharing your passion for schools and students. It exceeded my expectations and prepared me in so many ways for professional success.*

*This program is truly the best! I have been stretched and have grown in ways I never anticipated.*

*Thank you for such an incredible year of growth and the opportunity to be a part of such a terrific program. I have made lasting connections and this program has inspired me to reach for more.*

*I thought this was fantastic and I am already looking to see who I can recommend take this program in my local school districts! I got so much out of it and am so grateful for the network I've made!*

*I am forever grateful for the wonderful opportunity to participate in such an amazing program. The instruction, industry insight, stories, and collaboration were priceless. The words of wisdom and advice are embedded in my heart. I hope to someday give back to the program as this program has given me not only tools for success, but also the confidence needed to break out of my comfort zone and strive for more.*

*I'm so impressed by this program. Such a wonderful service to this industry. Thank you so much for allowing me this opportunity!*

*This program had such a profound impact on my life both professionally and personally. I will forever be grateful, and I hope to pay it forward one day.*

*This program was awesome! Words cannot express how appreciative I am that I finally completed the program. This weekend was bittersweet . . . happy to have completed it but sad that we won't be together again. Thank you so much!*

*Keep doing what you are doing. You are a fantastic team and it shows!*

*It is hard to come up with things to improve when you do such a great job. I think the addition of Shayleen has probably helped immensely.*



Participant J.J. Fotia practices his interview skills.

*Words cannot be used to describe what the program has meant to me. It has added to me both professionally and personally and I am forever grateful for it. Love you guys!!!*

*Life changing! This program has made me a better person at work and in my personal life. I'm glad I stayed with it and did not give up.*

As it does each year, the FCMAT CBO Mentor Program steering committee will continue to monitor the career advancement of participants in this cohort to further gauge the effectiveness of the training program.

## Comments from Previous Graduates

*I was recently appointed the Assistant Superintendent of Business. I can honestly say that I would not have made it this far in my career without the wonderful program you have built and put your hearts into, and more importantly your individual support over the years. You guys do incredible work!*

*I am so excited to tell you that I will be the new Assistant Superintendent, Business Services . . . I can't begin to tell you how much I appreciate both of you and all of the knowledge you shared with us in the Mentor Program. Thank you for pushing me and making me uncomfortable, I know it made a huge impact on how I performed in the interview. Please tell the new cohort to trust the process and listen to you because it can change their life, as I know it has changed mine.*

*Bill said, "Lead by example" many times during my CBO training. And, he continues to do so! Thank you so much . . . for making a difference in my life and those I serve! Your leadership endures!*

*. . . Included in the second interview was a 10-15 minute presentation to the interview panel on an overview of my plan for the "First 90 Days." Lucky for me, I went through the CBO Mentor Program and learned about the first 100 days as CBO!*

*I got the job!!! I just wanted to thank you again for allowing me the opportunity to be a part of the CBO Mentor Program, Cohort 10. I have no doubt that my experiences with you and my colleagues put me over the top because of the intensive "people skills" and interview techniques you offered.*

*THANK YOU THANK YOU THANK YOU to both of you from the bottom of my heart for all your support and encouragement! This new job would not be possible without you! There are truly no words to convey my appreciation.*

*I just wanted to let you know how much I appreciate all of the training, mentorship and friendship as I have taken on this new role as CBO. Day two and I feel like I have been drinking from a fire hose. But I feel prepared thanks to both of you.*



Suzanne Speck of SSC coaches participants in interview preparation and techniques.

## 2017-18 Mentors and Participants by Geographic Location

- ◆ Mentors
- ▲ Participants



## Sequence of Curriculum



Core Instructor Bill McGuire advises a participant during a practice interview session.

The requirements and responsibilities of CBOs in California public schools are detailed and complex. The training of future CBOs must include a curriculum that includes the work of practicing CBOs, what a CBO is required to know, and how to perform required tasks.

The FCMAT CBO Mentor Program curriculum is the key component of the delivery system; it is developed in a sequential format that reflects all the major components required of any CBO in the public school system. The major components and/or areas of instruction are school finance and school operations, with CBO leadership themes included throughout the program.

Available online via links in this report is a summary of assignments and activities for the 14<sup>th</sup> cohort program year. The entire curriculum and all participant assignments are posted to a Google Drive site that is password-protected but available for review upon request.

Any curriculum is only as effective and meaningful as the instructors. Through FCMAT's professional development resources, the FCMAT CBO Mentor Program contracted with two leading CBOs in the California public school system to be the core instructors who develop and deliver the curriculum: Francie Heim, retired Deputy Superintendent, El Dorado County Office of Education; and Bill McGuire, Deputy Superintendent, Twin Rivers Unified School District.

School Services of California is critical to the success of the program. In addition to vital segments on CBO leadership, the SSC team's expertise in job placement and interviewing for CBO positions is a popular and helpful segment of the program.

Instruction is delivered by the most qualified CBOs who are currently employed as expert school finance leaders in California school districts. In addition, educational leaders in school finance, leadership and/or school operations provide expertise in selected curriculum topics. The curriculum is practical and addresses the needs of a staff person who is learning the roles and responsibilities of a CBO.

## Course Content, Presenters and Support Team

The 2017-18 FCMAT CBO Mentor Program took place from April 2017 through March 2018 and included 10 training sessions; nine sessions were held at the Hilton Garden Inn, Sacramento, and one at the CASBO CBO Symposium held in November each year in either Northern or Southern California. A schedule showing all of the classes and instructors is available online and linked to [here](#).

Shayleen Harte served as the FCMAT liaison and mentor coordinator for cohort 14.



Participants Rob Pierce and Tony Carillo report on a group activity.

Francie Heim and Bill McGuire served as core instructors for all 10 sessions and coordinated the curriculum and speakers.

The entire team worked to support the participants and serve as a resource for them in their future careers as CBOs.

Mike Fine, CEO of FCMAT and Joel Montero, recently retired CEO of FCMAT, were a major presence in the program. Their

presentations on fiscal oversight and how to avoid fiscal crisis were two of the most highly rated segments of the program. They also attended the November class session and participated in the midyear evaluation with mentors and participants.

Ron Bennett of SSC gave presentations in February and March on collective bargaining and many other elements critical to the success of a CBO. For the last session's discussion of how to apply for a CBO position, he was joined by members of the SSC team.

Participants evaluated all sessions and provided the evaluations to the steering committee for review. [Evaluation survey results are available online and linked to here.](#)

## Training Schedule

The training dates are designed to accommodate the participants' work schedules. Each of the 10 sessions begins on Friday afternoon and continues all day on Saturday. Participants are responsible for travel and lodging costs. All other costs are covered by FCMAT. Most participants' employers help cover the costs, and scholarships are available for those with limited funds.

The training sessions are spread over 12 months and include approximately 150 hours of classroom instruction and more than 250 hours of independent work outside the classroom.

Training sessions were held at the Hilton Garden Inn in Sacramento, with the exception of the November session, which was held at the California Association of School Business Officials (CASBO) CBO Symposium in Anaheim. Classes were held from 3 to 9 p.m. on Friday and from 8 a.m. to 3 p.m. on Saturday. In addition, there were a number of optional pre-sessions from 1 to 3 p.m. on Friday that allowed participants to receive more in-depth training on specific topics.

The master schedule is shown below:

Session	Date
I	May 5 & 6, 2017
II	June 23 & 24, 2017
III	August 11 & 12, 2017
IV	September 8 & 9, 2017
V	October 6 & 7, 2017
VI	November 16-18, 2017
VII	December 8 & 9, 2017
VIII	January 5 & 6, 2018
IX	February 2 & 3, 2018
X	March 2 & 3, 2018



Participants (L-R) Tony Carillo, Tom Gray, Latasha Jamal, Matt Guinn and Mei Chan work on a bridge building activity.

## Evaluation System

The FCMAT CBO Mentor Program for 2017-18 established clear goals and objectives. To measure effectiveness and ensure accountability, the FCMAT CBO Mentor Program steering committee designed and established evaluation procedures to assess desirable instructor characteristics and measure the extent to which curriculum goals and objectives were being met.



Retired FCMAT CEO Joel Montero (left) leads a simulated cabinet meeting with participants Rob Pierce, Eugenio Villa, Rosa Cardona, Delores Perley and Mark Chavez..

Instructor/presenter characteristics were evaluated on a numerical scale of 1 (below satisfactory) to 5 (excellent). Additional sections on each evaluation form allowed participants to answer open-ended questions about how to improve curriculum delivery. The curriculum content for each session was evaluated throughout the year-long program. All evaluations are on file.

Participants complete their evaluations electronically by 5 p.m. on the first Monday after each weekend class. All evaluations are submitted to core instructor Bill McGuire, who summarizes the information.

The evaluation results are shared with the presenters, providing them with measurable feedback regarding the effectiveness of the presentation, as well as suggestions for improvement.

Mentors are asked to complete an evaluation before each session and provide immediate feedback on their interaction with their mentee.

## Formative Evaluation, Positive Approach

Formative evaluation was used to sample the process of learning and to help guide decisions about how the curriculum might be improved. Participants and presenters were evaluated in a nonthreatening manner. The evaluation system was designed to help those being evaluated adopt strategies that resulted in improvement and increased effectiveness.

This positive approach both demonstrates and fosters trust among the FCMAT CBO Mentor Program instructors, mentors and participants. The steering committee members believe that the instructors' current practices in education are proven and successful. Participants are able to work in an environment of trust and respect that enables them to give honest written feedback on the instructors' performances and on curriculum standards.

FCMAT CBO Mentor Program instructors anticipate that formative and positive evaluations will result in growth. The goal is to nurture a professional climate that encourages and enables change and commitment to excellence as it adapts to meet participants' ongoing needs. This approach has resulted in nonthreatening evaluations that promote growth for the overwhelming majority of instructors and participants.

## **Colleagues Evaluate**

One of several innovations that make the FCMAT CBO Mentor Program unique is that colleagues are asked to evaluate each other and the overall instructional system. The mentors, meeting with Mike Fine, are asked to perform a midyear evaluation in November to rate the effectiveness of the curriculum, participants, and overall instructional delivery. This peer review provides a relevant and practical way to receive feedback from colleagues qualified to make judgments about what it takes to become a successful CBO.

During prior midyear reviews, program leaders have received valuable suggestions that in many instances were implemented immediately.

## **Rating Outcomes**

The evaluation data on file shows a high rate of satisfaction among mentors and participants. The curriculum and instruction were typically rated as above average or excellent. Participants noted that they gained valuable knowledge and skills that could be applied to their existing positions or help them obtain a CBO position. Each participant indicated that the program was worthwhile and that they would recommend the program to colleagues who aspire to become CBOs.

## **Follow-Up Survey of Participants**

The FCMAT CBO Mentor Program Steering Committee, through FCMAT, conducts informal follow-up surveys of participants in each cohort. The results indicate that participants who attended the FCMAT CBO Mentor Program have significantly advanced their careers.

## **Writing Assignments and Midyear Evaluation**

A successful CBO must be able to communicate well with a variety of audiences. The FCMAT CBO Mentor Program is fortunate to have FCMAT's technical writers teach a writing and communication segment on the first weekend of the program.

In addition, the program provides multiple opportunities for writing assignments and evaluation. Participants are required to write a 300-word paper on an assigned topic for most sessions.

The first assignment was to write about student achievement in the participant's district. This assignment was evaluated by the mentor and then given a thorough, in-depth review and rewrite by the FCMAT technical writers, which sets the stage for this important element of the program. Other writing topics are assigned throughout the year including LCFF, budget philosophy, and cash flow issues. Participants are charged with making their communication understandable to the general public.

In November, the program conducts a midyear evaluation with each participant that focuses on a number of criteria (see below). A short written summary of the verbal conversation is provided to the participant and the mentor.

Midyear evaluation elements:

- Individual feedback – How is the program working for the participant?
- Team presentation – Review of team dynamics and elements of a group presentation
- Individual presentation style
- Class participation
- Writing skills
- General leadership
- Overall assessment

For the writing segment, the program uses a professional writer who is not affiliated in any way with education. The writer reviews the portfolio of work done to date and evaluates grammar, punctuation, sentence structure and flow. In addition, the writer evaluates and provides input regarding whether the document is understandable to the general public.



Participants display their finished product from a leadership exercise in building a bridge. The exercise requires the team to bid on their project and estimate the time needed to complete it. The project is then revised with change orders and other events that make it more challenging to complete. Front row (L-R): Heather Brown, Mary Navas, Beth Roberts, Dolores Perley, Laura Lilley, Gretchen Bergstrom and Norma Gonzales; Back row (L-R): J.J. Fotia, Matthew Zito, Kilee Lane, Amy Nichols and Kristin Armatis.

## Candidate Assessment

Candidate assessment is a result of collaboration with the California Association of School Business Officials (CASBO) to identify measurable standards required of participants who wish to obtain the CASBO CBO certification after successfully completing the FCMAT CBO Mentor Program. The mentor and participant complete the candidate assessment. The participant is responsible for making contact with the CASBO CBO certification chairperson and for following the application procedure that CASBO has developed.



Latasha Jamal and Delores Perley engage in lively discussion.

Appendix B contains a copy of the FCMAT CBO Mentor Program candidate assessment document. In the candidate assessment process, the FCMAT CBO Mentor Program participant and mentor meet, and the mentor rates the participant's skills and recommends the participant for either CASBO CBO certification or additional study.

The participant's skills are rated in the following categories:

1. Basic business knowledge
2. Leadership
3. Operations

The participant is rated against measurable standards to determine if they meet the standard, exceed the standard, or should pursue professional growth in order to meet the standard.

If a participant is recommended by their mentor for CBO certification, he or she applies to CASBO for certification. If the CASBO certification advisor concurs with the mentor assessment, the participant will receive CBO certification.

The candidate assessment has proven to be a reliable measurement of whether the program has prepared a candidate to obtain CASBO CBO certification. It is another example of how the FCMAT CBO Mentor Program provides relevant and measurable accountability for its curriculum and content standards.

## FCMAT CBO Mentors

The dictionary defines mentor as *a wise and trusted guide and advisor, teacher, or counselor*. Pairing experienced and successful CBOs with participants sets the FCMAT CBO Mentor Program apart from other similar programs. The mentors are the cornerstone of the program and are critical to the success of program participants.

Many of the mentors have served in the program since the beginning. The most successful mentors often nominate participants they believe have the attributes to be successful. The mentors serve as the best advertisement for the program.

## Purpose

Mentors work with their assigned participants throughout the program. They review and provide input into their assignments, provide feedback on current education finance and budget issues, and share the knowledge and wisdom they have gained from years of experience in the field.

## Qualifications

CBOs who desire to become mentors in the program are expected to meet the following qualifications:

- Currently hold the position of CBO or are actively involved as a retired CBO.
- Have extensive experience as a CBO, typically 10 years or more.
- Have hands-on experience in all facets of school business operations.
- Hold a degree in a business-related field, CBO certification, or demonstrated workplace experience.
- Have demonstrated performance developing school business personnel.
- Are committed to providing one-to-one mentoring support to each participant.
- Are able to provide work-study supervision to a participant according to the curriculum guidelines.

## Selection Process

Mentors are matched to participants based on compatible skill sets and needs as well as geographic considerations. Mentors from past programs are often selected to participate again. An individual may apply to be a mentor, and the selection committee may also recruit individuals they believe will be a good match as a mentor for a particular participant.

## Mentor Responsibilities

Mentors are expected to do the following:

- Be available to the participant and provide guidance and support to the participant via email, telephone, or in person. Core instructor Bill McGuire sends out a survey monthly and collects feedback from mentors about their interaction with participants.
- Monitor assigned projects and provide feedback to the participant.
- Provide an objective evaluation of the participant's progress by providing regular feedback to the participant.

- Participate with FCMAT in a joint evaluation of the program at the November meeting.
- Complete all evaluation forms regarding the effectiveness of the FCMAT CBO Mentor Program as requested by FCMAT.
- Provide FCMAT with feedback regarding strengths and weaknesses of the FCMAT CBO Mentor Program curriculum.
- Attend one of the two orientation sessions (required):
  - Mentor orientation held in conjunction with the CASBO conference, or
  - Mentor orientation held at the opening session of the class.
- Mentors are welcome to attend all class sessions. Mentors are especially encouraged to attend at least the first class session, the evaluation meeting at the November CBO Symposium, and graduation ceremonies.
- At the end of the program, assess the participant's areas of strength and identify areas of growth.

CASBO CBO certification is not automatic: at the end of the program, the mentor makes a recommendation to the CASBO certification advisor regarding whether the participant should receive CBO certification. The mentor may recommend that the participant take additional classes to become qualified. Final award of the CBO certification depends on the decision of the CASBO certification advisor.



(L-R) Core Instructor Bill McGuire, President and CEO of SSC Ron Bennett, Core Instructor Francie Heim, FCMAT Liaison and Mentor Coordinator Shayleen Harte, Retired FCMAT CEO Joel Montero, and FCMAT CEO Mike Fine.

Teaming an experienced CBO mentor with each program participant ensures that each participant completes the program successfully. It is anticipated that mentors will continue to be trusted resources for the participants as they move forward in their careers as CBOs.

## FCMAT CBO Mentor Coordinator

A coordinator is defined as *someone who sees that things run harmoniously*. The FCMAT CBO Mentor coordinator, Shayleen Harte, is a key link between the mentors and the program's leaders, ensuring the flow of communication and information between both groups.

### Purpose

The main purpose of the mentor coordinator is to provide assistance, support and communication to the mentors, and to monitor their activities with the participants. As a member of the steering committee, the coordinator attends all leadership meetings and reports on mentor activities and on concerns that may have been expressed regarding any participants. The coordinator attends the CASBO mentor orientation, CASBO alumni social, first day of class/mentor orientation, November midyear review, and graduation.

### Responsibilities

The FCMAT CBO Mentor coordinator does the following:

- Proposes initial assignment of mentors to participants for the steering committee, based on geographic location and reasonable accommodation.
- Meets with mentors at the initial orientation and at the midyear evaluation to review their responsibilities and the program's expectations of them; seeks their input regarding the program's effectiveness.
- Communicates regularly with mentors about the participants' upcoming projects and timelines.
- Communicates with mentors at the conclusion of the program to seek their input regarding the program's effectiveness, and provides input regarding whether their participant should be recommended for CASBO CBO certification.
- Is available to mentors and responds to their questions and concerns.
- Is available to participants in the event of problems with their mentors.
- Participates as a member of the steering committee.
- Receives and maintains a file of annual candidate assessment documents at the completion of each cohort.
- Follows up with mentors to ensure 100% return of monthly surveys and follows up on comments and concerns.

The communication, coordination and support provided by this position is a critical element that ensures the success of the program for both mentors and participants. The mentor coordinator works with everyone involved to further the success of the program.

## Steering Committee

The primary purpose of the FCMAT CBO Mentor Program steering committee is to serve in an advisory role to FCMAT, which funds the program through its professional development program. The committee was chaired by Mike Fine, Chief Executive Officer of FCMAT.

Following is a list of FCMAT CBO Mentor Program steering committee members for the 14<sup>th</sup> cohort:

Mike Fine	Fiscal Crisis & Management Assistance Team
Shayleen Harte	Fiscal Crisis & Management Assistance Team
Francie Heim	FCMAT CBO Mentor Core Instructor
Bill McGuire	FCMAT CBO Mentor Core Instructor

In addition to formal meetings, steering committee members communicate regularly on an informal basis to monitor, evaluate and guide the progress of the FCMAT CBO Mentor Program. Upon the completion of each CBO training session, committee members are debriefed to determine the strengths and weaknesses of the session.

## Budget

The FCMAT board of directors has been very involved and is supportive of FCMAT taking a leadership role in professional development in California to help school districts maintain fiscal accountability and sound fiscal practices.

The FCMAT board has also been supportive of allocations from the FCMAT budget to help meet California school districts' need for trained and qualified CBOs.

To ensure that selected participants are able to attend the workshops, a scholarship fund account was established so that any participants who could not afford travel and lodging would have these fees paid for by CASBO.

The actual expenditures for the FCMAT CBO Mentor Program 14th cohort (2017-18) were as follows.

FCMAT CBO Mentor Program 14 <sup>th</sup> Cohort Actual Expenditures		
Printing and Supplies	\$	9,437
FCMAT Travel and Reimbursement	\$	3,598
Room Costs/Alumni Event/Food	\$	48,438
Mentor Stipend/Mentor Coordinator	\$	50,750
Facilitators/Presenters	\$	73,234
Total	\$	185,457

## Participant and Mentor Applications

These applications are available online and linked to here:

[Participant Application](#)

[Mentor Application](#)



## **Appendices**

### **Appendix A**

FCMAT CBO Mentor Program 2017-18 Participants

FCMAT CBO Mentor Program 2017-18 Mentors

Curriculum Materials Website

### **Appendix B**

FCMAT CBO Mentor Candidate Assessment Form



## Appendix A

### FCMAT CBO Mentor Program 14th Cohort Participants

**Kristin Armatis**, Senior Director, Charter Schools, San Diego COE

**Gretchen Bergstrom**, Assistant Superintendent, Business, Sulphurs Springs USD

**Heather Brown**, Chief Business Official, Grant ESD

**Rosa Cardona**, Director of Fiscal Services, Kings Canyon USD

**Tony Carrillo**, Accounting Supervisor, Palm Springs USD

**Mei Chan**, Director of Fiscal Services, New Haven USD

**Mark Chavez**, Executive Director of Nutrition Services & Warehousing, Oakland USD

**Kevin Emenaker**, Executive Director, Administrative Services, Alvord USD

**Marie Espinoza**, Director of Transportation, San Bernardino City USD

**J.J. Fotia**, Director of Maintenance and Operations, and Transportation, Redlands USD

**Dalia Gadelmawla**, Administrative Director, Business Services, Corona-Norco USD

**Norma Gonzales**, Assistant Superintendent, Human Resources, Pittsburg USD

**Tom Gray**, Director of Fiscal Services, Pleasanton USD

**Matt Guinn**, Principal, Kern HSD

**Latasha Jamal**, Director of Fiscal Services, Moorpark USD

**Ian Johnson**, Principal Consultant, Senate Education Committee

**Kilee Lane**, Director of Fiscal Services, Washington USD

**Laura Lilley**, Senior Director, District Business Services, Placer COE

**Howard Marinier**, Administrator, Business Services, Orange CDE

**David Miranda**, Senior Director, Maintenance and Operations and Facilities, Tustin USD

**Mary Navas**, Director of Business Services, Scotts Valley USD

**Amy Nichols**, Technology Director, Pleasanton USD

**Drew Passalacqua**, Assistant Superintendent, Business Services, West Covina USD

**Delores Perley**, Chief Financial Officer, San Dieguito Union HSD

**Rob Pierce**, Deputy Superintendent, Business Services and Facilities, Elk Grove USD

**Kathryn Rusk**, Coordinator, District Fiscal Oversight, San Joaquin COE

**Beth Roberts**, Accountant, Anderson Union HSD

**Arleen Sanchez**, Chief Business Official, Lake Elsinore USD

**Brock Smith**, Executive Director, Facilities and Operations, Vista USD

**Tim Stowe**, Deputy Superintendent, Administrative Services, Torrance USD

**Eugenio Villa**, Chief Business Official, Inglewood USD

**Matthew Zito**, Chief Facilities Officer, Sequoia Union HSD

## **FCMAT CBO Mentor Program 14th Cohort Mentors**

**Lora Duzyk**, Retired CBO/Consultant

**Jennifer Noga**, FCMAT\*

**David Flores**, Shasta Union HSD\*

**Terry Bradley**, Retired CBO/Consultant

**Jim Novak**, CBO, Palo Alto USD

**Akur Varadarajan**, Retired CBO/Consultant\*

**Michael Bishop**, Retired CBO/Consultant

**Colleen Patterson**, Retired CBO/Consultant

**Jayne Christakos**, CBO, San Bernardino City USD\*

**Vince Christakos**, CBO, Hemet USD

**Richard DeNava**, CBO, San Bernardino COE\*

**Maureen Evans**, Retired CBO/Consultant

**Raul Parungao**, CBO, Fremont USD

**Priscilla Quinn**, CFOO, Kern COE

**Don Zimring**, Retired CBO/Consultant

**Tami Ethier**, FCMAT

**Scott Lantsberger**, CBO/Consultant\*

**Bruce Colby**, CBO, Davis Joint Union SD\*

**Wendy Benkert**, Retired CBO/Consultant

**Tony Soria**, CFO, Tustin USD\*

**Mary Hart**, CBO, Santa Cruz COE\*

**Micaela Ochoa**, CBO, Pleasanton USD

**Pearl Iizuka**, Retired CBO/Consultant

**Eric Dill**, CBO, Santa Clara USD\*

**Eric Hall**, Retired CBO/Consultant

**Jim Thomas**, Retired CBO/Consultant

**Rhonda Crawford**, CBO, Folsom Cordova USD

**Darrin Watters**, CBO, Val Verde USD

**Donna Caperton**, CBO, Vista Unified SD\*

**John Gray**, School Services of California

**Scott Price**, CBO, Los Angeles Unified SD\*

**Chris Learned**, Retired CBO/Consultant

*\* Indicates CBO Mentor Program alumni*

### **Curriculum Materials Website**

Complete curriculum materials, student assignments, portfolios, evaluations and other documents are accessible on the program's Google Drive website under the Drive section of [www.google.com](http://www.google.com). Relevant items are posted the Wednesday before each session so participants can review material prior to the session if desired. Additional resources are also posted as they become available to build a resource library for participants.

For information on how to access the Google Drive website, please email Shayleen Harte at [sharte@fcmat.org](mailto:sharte@fcmat.org).



## **Appendix B**

### **Candidate Assessment Form**



## CBO Mentor Program Candidate Assessment

CBO Mentor Program Candidate \_\_\_\_\_ Date \_\_\_\_\_

CBO Mentor Program Mentor \_\_\_\_\_ Date \_\_\_\_\_

### Mentor Recommendation:


I recommend for CBO certification.

I recommend the candidate take the following additional class(es) or get the following additional experience, prior to CASBO CBO certification

I have reviewed this document with my Mentor/Candidate:

Mentor Signature: \_\_\_\_\_ Date \_\_\_\_\_

Candidate Signature: \_\_\_\_\_ Date \_\_\_\_\_

Mentor Comments:

Note: Mentor recommendation and candidate signature complete the qualifications. It is the candidate's responsibility to file for CBO certification through the CASBO office ([www.casbo.org](http://www.casbo.org)) and final approval rests with the CASBO certification process.

Please send a copy of signed form to:

**Francie Heim**

**Email signed form:** [francieheim@gmail.com](mailto:francieheim@gmail.com)

**Or US Mail to: Francie Heim**

**Po Box 331**

**Shingle Springs CA 95682**

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Basic Business Knowledge	Description	Meets Standard	Exceeds Standard	Area of Professional Growth
School Finance Basic Knowledge, including Revenue Limits and Special Education funding	Has knowledge of the language of school business and terminology such as COLA, deficits, Prop. 98, Special Education Local Plan, etc..	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charter Schools	Has knowledge of charter schools and the roles and responsibilities of the authorizing LEA.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accounting and auditing basics, including student attendance accounting	Has knowledge of accounting and auditing practices and regulations as pertain to CA public school districts and other publicly financed entities. Has knowledge of student attendance accounting systems commonly used in CA and the cycle and methodologies of reporting, analyzing, and producing the required data elements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to communicate basic school finance	Can use appropriate terminology and methodologies to explain such terms as COLA, deficits, Prop. 98, Governor Budget proposal, etc. in public setting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analysis of Financial Reports	Able to read and understand official SACS forms and audit reports, and is able to "tell the story"	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Office Systems	Understands the importance of building strong systems in the business office to produce reliable and credible data for decision making.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Budget Development	Has knowledge of how to develop single and multi-year budgets as well as the ability to analyze and determine that existing systems are in place to ensure reliable budget data is produced.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to communicate budget data	Demonstrated ability to do a budget presentation to the school board or other like group using appropriate technologies.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Computer literacy, spreadsheet software	Demonstrated ability to use a variety of computer applications with emphasis on presentation software and spreadsheet literacy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Leadership</b>	<b>Description</b>	<b>Meets Standard</b>	<b>Exceeds Standard</b>	<b>Area of Professional Growth</b>
Sensitivity to Confidential Issues	Understands district politics, legal communications and confidentiality of information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working with the media	Understands the importance of working with the media. Has the ability to communicate clearly and concisely the appropriate message.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logical Thinking Skills	Ability to reason; exhibits sound judgment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analytical Abilities	Can identify problems/issues and their component parts, evaluate options, and recommend viable solutions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creative Financing & Entrepreneurship	Ability to provide financing options and to provide leadership in their implementation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilitation skills	Ability to lead groups, elicit all needed information and have groups feel positive about the process and outcomes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership	Ability to identify the “big picture”; ability to persuade people to take action. Collaborates well with others.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication	Ability to communicate well in written form. Strong public speaking skills.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
People Skills/Relationships	Understand the importance of building relationships within the district and the community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>Operational</b>	<b>Description</b>	<b>Meets Standard</b>	<b>Exceeds Standard</b>	<b>Area of Professional Growth</b>
Transportation	Understands transportation systems and methods. Understands routing methodology and assumptions. Knowledge of legal requirements for transportation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Food Services	Knowledge of revenue streams for food services; legal requirements for food preparation in schools. Understands the potential entrepreneurial aspects of food service programs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance and Operations	Knowledge of cleaning standards for schools; work order systems and importance of ongoing investment in facility maintenance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Human Resource Management	Knowledge of hiring and firing practices in CA public schools. Understand the importance of recruitment, retention and evaluation of employees.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilities	Knowledge of funding sources for facilities; legal construction and bid requirements. Understanding of bond election process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information & Technology Systems	Knowledge of information systems in schools; use of technology in education; Erate applications, support to users, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risk Management	Knowledge of insurance options; cost containment principles; legal requirements for insurance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal	Ability to read, understand and interpret ed codes; contracts and other legal documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Health and Welfare	Knowledge of cost containment principles; methods of funding for Health & Welfare.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collective Bargaining	Knowledge of leadership aspects as well as fiscal aspects of negotiations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Purchasing and Bid Awards	Knowledge of legal requirements; options for purchasing products.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demographics/School Staffing	Knowledge of staffing classrooms and the appropriate classified support personnel.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



