

FCMAT CBO Mentor Program

Executive Report

February 2021 – March 2022 · Eighteenth 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, SEPTEMBER 21, 2022

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Acknowledgments

The Fiscal Crisis and Management Assistance Team (FCMAT), the FCMAT Board of Directors, and the Kern County Superintendent of Schools as the administrative agent for FCMAT acknowledge the efforts of the following contributors to the Chief Business Official (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), for their partnership with FCMAT and their joint endeavors in creating and sustaining the FCMAT CBO Mentor Program.
- FCMAT CBO Mentor core instructors Francie Heim,* retired deputy superintendent of the El Dorado County Office of Education, and Bill McGuire,* retired deputy superintendent of the Twin Rivers Unified School District and former superintendent of the St. Helena Unified School District, for their direct instruction, development of curriculums, assistance in scheduling, and mentoring of all participants.
- School Services of California and their team, for their training on what it takes to be 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 2021.
- The 25 FCMAT CBO Mentor Program mentors, for providing support and assistance to the newly graduated 18th cohort of the FCMAT CBO Mentor Program.
- The 25 FCMAT CBO Mentor Program participants, for completing the rigorous training program. We congratulate them and support their efforts to achieve their career objectives.



FCMAT CBO Mentor Program core instructors Francie Heim and Bill McGuire.

*As the core instructors of the FCMAT CBO Mentor Program since its inception, Bill and Francie have played an essential role in the success of its participants over the past 18 years. They have spent countless hours preparing the next generation of CBOs, engaging in meaningful dialogue, and inspiring others to be their best. We are grateful for all Bill and Francie have done to help build capacity in school business, and we celebrate their outstanding dedication to the FCMAT CBO Mentor Program.

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 learning activities to improve the fiscal expertise of local educational agencies. The FCMAT CBO Mentor Program is one of the professional learning activities initiated by FCMAT, in partnership with other educational agencies, to improve school district fiscal operations and accountability.

For many years, there has been a serious shortage of qualified and trained business officials who can provide leadership in the business and operational aspects of a school district. With school funding having undergone a significant transformation with the Local Control Funding Formula and Local Control and Accountability Plan, the need for strong CBO leaders continues to grow.

The FCMAT CBO Mentor Program is a systematic, structured professional learning program. Participants learn the role and functions of a CBO for a California school district. The CBO Mentor Program focuses on the need for CBO leaders to understand their role as part of a district’s strategic plan to improve outcomes for students. 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 12 months; 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.

The 18th year of the program was 2021-22. 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
Nickel & a Dime	2018-19	26
Sweet 16	2019-20	29
Quaran7Teen	2020-21	26
Saved the Best for Last	2021-22	25

As of March 2022, 463 FCMAT CBO Mentor participants have graduated from the program.

Cohort 19 is scheduled to begin in January 2023.

FCMAT welcomes all inquiries and 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 that reads "Michael H. Fine". The signature is written in a cursive, flowing style.

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

The 2021-22 FCMAT CBO Mentor Program

Program Overview

The FCMAT CBO Mentor Program is an innovative one-year professional learning 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, and 32 viewed as the maximum.

The program curriculum covers school finance, facilities, maintenance and operations, nutrition services, transportation, debt financing and bonds, legal issues, the language of the instructional division, and much more. The sequence of instruction includes a broad, in-depth 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.



Matthew Horvath, Wendy Frederickson and Harvey Olsingh work together on a leadership activity that promotes communication and teamwork

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, and introduction to instruction
 - finance, accounting, and budgeting
 - facilities
 - maintenance and operations
 - transportation
 - nutrition services
 - 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 verbal and written communication skills.

Curriculum Methods

1. Work-study to facilitate 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.](#)



Jason Willis presents to the class on school budgeting.

Why the FCMAT CBO Mentor Program?

California schools have undergone a time of significant change with a shift to the K-12 Local Control Funding Formula (LCFF) and the Local Control and Accountability Plan (LCAP). CBOs need to understand their leadership role in ensuring their districts are focusing resources to improve outcomes for students.

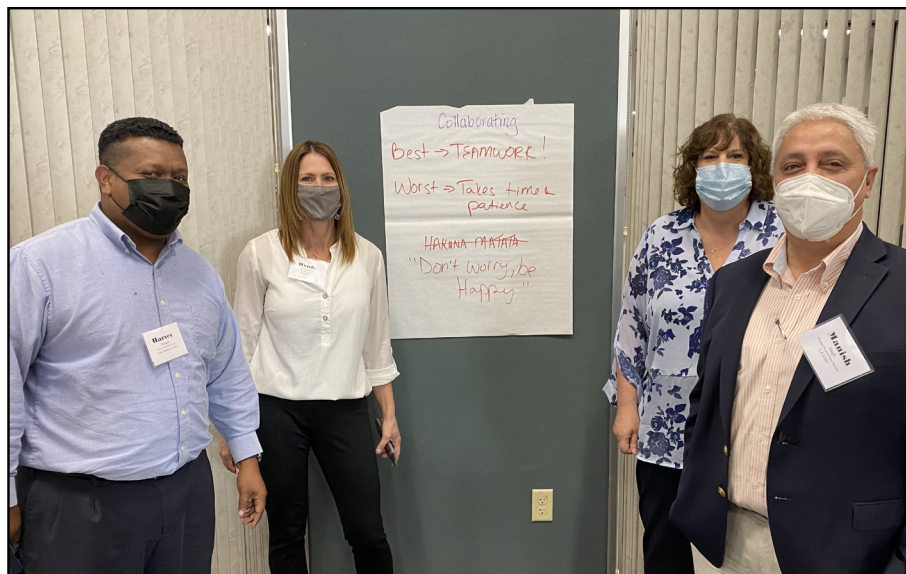
The need for CBO leaders trained in financial and operational best practices has never been greater. Veteran CBOs continue to retire in large numbers. County administrators and trustees continue to be appointed to school districts that have received state emergency appropriations to balance their budgets, and county offices of education have appointed a number of fiscal advisors to districts 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 18 years, an increasing number of graduates from the FCMAT CBO Mentor Program have been employed as CBOs and directors 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:

COE CBOs	Jared Critchfield	Amador COE
	Aaron Heinz	Colusa COE
	Denise Porterfield	Contra Costa COE
	Jeff Napier	Del Norte COE
	Tom Snyder	Inyo COE
	Jamie Dial	Kings COE
	Karen Kimmel	Los Angeles COE
	Kate Lane	Marin COE
	Martin Fregoso	Placer COE
	Lisa Cavin	Plumas COE
	Scott Price	Riverside COE
	Nicolas Schweizer	Sacramento COE
	Richard De Nava	San Bernardino COE
	Scott Anderson	San Joaquin COE
	Liann Reyes	Santa Cruz COE
	Greg Medici	Sonoma COE
	Aaron Thornsberry	Yuba COE



Participants Harvey Olsingh, Wendy Frederickson, Lorelle Mudd and Manish Singh participate in a leadership exercise on conflict style.

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 Directors and Managers	Travis Haskill	Butte COE
	Julie Brunson	Calaveras COE
	Cindy Peterson	Contra Costa COE
	Wendy Frederickson	El Dorado COE
	Diane Lacombe	El Dorado COE
	Roslynne Manasala Smith	El Dorado COE
	Gabriel Hall	Fresno COE
	Patty Banuelos	Orange COE
	Howard Marinier	Orange COE
	Gary Stine	Orange COE
	Laura Lilley	Placer COE
	Eugene Villa	Riverside COE
	Peter Foggiato	San Joaquin COE
	Terrell Martinez	San Joaquin COE
	Kathryn Rusk	San Joaquin COE
	James Arcala	San Mateo COE
	Wendy Richard	San Mateo COE
	Denice Cora	Santa Barbara COE
	Diane Baumhover	Tuolumne COE
	Debra Hinely	Yolo COE
Veronica Moreno	Yolo COE	



FCMAT CEO Mike Fine and liaison Shayleen Harte, core instructors Francie Heim and Bill McGuire, and mentor coordinator Richard De Nava pictured with the 18th cohort at the CBO symposium.

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, have been promoted within their current district, or have taken a job with a higher level of responsibility. In most instances, the promotion or new role 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
Catherine Bojorquez	Vice President of Business & Administrative Services/Chief Financial Officer	Ventura College	Southern CA
Donna Caperton	Chief Business Official, Retired	Vista USD	Southern CA
Karl Christensen	Assistant Superintendent of Business Services/Chief Business Official	Santee SD	Southern CA
Dave Doomey	Chief Business Official, Retired	Capistrano USD	Southern CA
Grace Garner	Chief Business Official, Retired	Garvey ESD	Southern CA
Mary Hart	Chief Business Official, Retired	Santa Cruz COE	Bay Area/Other CA
Renee Hendrick	Associate Superintendent of Administrative Services	Orange COE	Southern CA
Robbie Montalbano	Intervention Specialist	FCMAT	Central CA
John Von Flue	Chief Analyst	FCMAT	Central CA

Second Cohort

Name	Title	LEA	Region
Janelle Bryson	Chief Business Official	Sierra USD	Central CA
Bruce Colby	Chief Business Official	Fremont USD	Bay Area/Other CA
Eric Dill	Assistant Superintendent of Business Services/Chief Business Official	Carlsbad USD	Southern CA
Ginger Fitzgerald	Chief Business Official, Retired	Lassen Union HSD	Northern CA
Fred Harris	Chief Business Official, Retired	Gavilan College	Bay Area/Other CA
Elaine Janson	Chief Business Official, Retired	Sierra Sands USD	Central CA
Jamie Perry	Chief Business Official, Retired	Fresno COE	Central CA
Brad Rohrbach	Assistant Superintendent of Business Services/Chief Business Official	Porterville USD	Central CA
Akur Varadarajan	Chief Financial Officer	Calbright College	Bay Area/Other CA

Third Cohort

Name	Title	LEA	Region
Ann Barron	Chief Business Official, Retired	Cotati-Rohnert Park USD	Northern CA
Matt Beecher	Deputy Superintendent of Business Services/Chief Business Official	Santa Maria-Bonita SD	Southern CA
Song Chin-Bendib	Assistant Superintendent/Chief Business Official	Pacific Grove USD	Bay Area/Other CA
Jennifer Fusano	Chief Business Official	Placerville Union ESD	Northern CA
Robert Groeber	Chief Business Official, Retired	Visalia USD	Central CA
Susan Kinder	Chief Business Official	Livermore Valley Joint USD	Bay Area/Other CA
Sean Martin	Assistant Superintendent of Business Services/Chief Business Official	Folsom-Cordova USD	Northern CA

John Mendiburu	Associate Superintendent	Kern County Supt. of Schools	Central CA
Jennifer Noga	Intervention Specialist	FCMAT	Central CA
Cindy Petersen	Superintendent/Chief Executive Officer	Gateway Charter	Northern CA
Jeff Potter	Intervention Specialist	FCMAT	Central CA
Jerry Stratton	Chief Business Official, Retired	Salinas City ESD	Bay Area/Other CA
Tim Zearley	Associate Superintendent of Business Services/Chief Business Official	Modesto City Schools	Central CA

Fourth Cohort

Name	Title	LEA	Region
Jordan Aquino	Assistant Superintendent of Business Services/Chief Business Official	Desert Sands USD	Southern CA
Mary Kay Callaway	Chief Business Official, Retired	Winters Joint USD	Northern CA
Melody Canady	Assistant Superintendent of Business & Fiscal Services/Chief Business Official	Santa Monica-Malibu USD	Bay Area/Other CA
Jayne Christakos	Chief Business Official, Retired	San Bernardino City USD	Southern CA
Christine Giraldo	Chief Business Official, Retired	Sierra Sands USD	Central CA
Linda Himmel	Chief Business Official, Retired	Gold Oak Union ESD	Northern CA
Lori Isom	Assistant Superintendent of Business Services/Chief Business Official	Central SD	Southern CA
Gretchen McReynolds	Business Manager/Chief Business Official	Vallecito Union SD	Northern CA
Anthony Soria	Chief Financial Officer	Tustin USD	Southern CA

Fifth Cohort

Name	Title	LEA	Region
Leslie Barnes	Chief Finance & Operations Officer/Chief Business Official	Pasadena USD	Southern CA
Kassandra Booth	Chief Business Official	Oakdale Joint USD	Central CA
Shawn Cabey	Assistant Superintendent of Administrative Services/Chief Business Official	Westside Union SD	Southern CA
Filipinas Duldulao	Director of Fiscal Services, Retired	San Juan USD	Northern CA
Melody Glaspey	Chief Business Official, Retired	Eureka Union SD	Northern CA
David Flores	Chief Business Official	Shasta Union HSD	Northern CA
Brian Hawkins	Assistant Superintendent of Business Services/Chief Business Official	Antelope Valley Union HSD	Southern CA
Scott Lantsberger	Chief Business Official	Colusa USD	Northern CA
Christine Statton	Chief Business Official, Retired	College of the Sequoias	Northern CA
Judy Thomson	Director of Fiscal Services, Retired	Sonoma COE	Northern CA
Jeff Trader	Assistant Superintendent/Chief Business Official	Newport-Mesa USD	Southern CA
Peter VanBuskirk	Director of Fiscal Services	Palm Springs USD	Southern CA
Jason Willis	Director of Strategic Resource Planning & Implementation	WestEd	Bay Area/Other CA

Sixth Cohort

Name	Title	LEA	Region
Helen Bellonzi	Chief Business Official	West Park ESD	Northern CA
Pam Buckhout	Director of Fiscal Services, Retired	Hemet USD	Southern CA
Carolyn Chow	Chief Business Official	Palo Alto USD	Bay Area/Other CA
Linda Fabre	Assistant Superintendent of Human Resources, Retired	San Bernardino COE	Southern CA
Debbie Fry	Director, Retired	School Services of CA	Northern CA
Jennifer Goodner	Budget Manager	Fortuna ESD	Northern CA
Yancy Hawkins	Associate Superintendent/Chief Business Official	San Mateo Union HSD	Bay Area/Other CA
Megan Lamken	Chief Business Official, Retired	Ravenswood City ESD	Bay Area/Other CA
Michael Merrill	Superintendent	Summerville Union HSD	Northern CA
Kathryn Perkins	Chief Business Official, Retired	Charter Oak USD	Southern CA
Greg Rash	Director of Business Services, Retired	Twin Rivers USD	Northern CA
Candace Reines	Assistant Superintendent of Business Services/ Chief Business Official	Perris Union HSD	Southern CA
Todd Rivera	Executive Director of Business Services/Chief Business Official	Tahoe-Truckee USD	Northern CA
Fred Van Vleck	Superintendent	Eureka City Schools	Northern CA

Seventh Cohort

Name	Title	LEA	Region
Tom Barentson	Chief Business Official, Retired	Sacramento City USD	Northern CA
Tina Douglas	Associate Superintendent of Business Services/Chief Business Official	San Dieguito Union HSD	Southern CA
Wael Elatar	Chief Business Official	El Monte Union HSD	Southern CA
Tom Etchart	Director of Fiscal Services, Retired	Ventura COE	Southern CA
Barbara Henderson	Chief Business Official, Retired	Marin COE	Northern CA
Joyce Lopes	Vice President of Business & Financial Affairs	Western Washington University	Washington
Kraig Magnussen	Assistant Superintendent/Chief Business Official	Kerman USD	Central CA
Brett McFadden	Deputy Superintendent	Monterey COE	Central CA
Cecile Nunley	Chief Business Official, Retired	Vallejo City USD	Northern CA
Harley Robertson	Chief Business Official, Retired	Soquel Union ESD	Bay Area/Other CA
Jane Shamieh	Superintendent	Vacaville USD	Northern CA
Debra Silva	Chief Business Official	Hart-Ransom Union ESD	Central CA
Dennis Snelling	Chief Business Official, Retired	Roseville City ESD	Northern CA
Jennifer Stahlheber	Chief Financial Officer	San Juan USD	Northern CA
Chris Vaz	Chief Business Official	Washington USD	Central CA
Tommy Welch	Chief Business Official, Retired	Solano COE	Northern CA
Paul Ziegler	Assistant Superintendent of Business Services/ Chief Business Official	Eureka City Schools	Northern CA

Eighth Cohort

Name	Title	LEA	Region
Virginia Alvarez	Chief Business Official	Montecito Union ESD	Southern CA
Diane Deshler	Chief Business Official	Lafayette ESD	Bay Area/Other CA
Lisa Donaldson	Assistant Superintendent of Business Services/ Chief Business Official	Rescue Union ESD	Northern CA
Nick Heinlein	Assistant Superintendent of Business Services/ Chief Business Official	Saugus Union SD	Southern CA
Robert McEntire	Chief Business Official	West Contra Costa USD	Bay Area/Other CA
Mark Schiel	Chief Business Official	Santa Clara USD	Bay Area/Other CA
Robin Schmitt	Chief Business Official	Brentwood Union ESD	Bay Area/Other CA
Jeff Starr	Assistant Superintendent of Business Services/ Chief Business Official	Huntington Beach Union HSD	Southern CA
Mark Stevens	Superintendent	Borrego Springs USD	Southern CA
Lori Van Gogh	Chief Financial Officer	Sunnyvale SD	Bay Area/Other CA
Christine Walker	Superintendent	Hueneme ESD	Southern CA
Andrea Ward (Dodson)	Intervention Specialist	FCMAT	Central CA

Ninth Cohort

Name	Title	LEA	Region
Jean Aldrete	Chief Business Official	Saratoga Union ESD	Bay Area/Other CA
Julie Bautista	Chief Business Official	Acalanes Union HSD	Bay Area/Other CA
David Bennett	Assistant Superintendent of Facilities & Operations	Lowell Joint SD	Southern CA
Keith Butler	Chief Business Official	Torrance USD	Southern CA
Ryan DiGiulio	Associate Superintendent of Business/Chief Business Official	Fontana USD	Southern CA
Karen Gosting	Chief Business Official, Retired	Orland Joint USD	Northern CA
Kim Greer	Chief Business Official, Retired	Guadalupe Union ESD	Southern CA
Richard Holash	Chief Business Official, Retired	Buena Park ESD	Southern CA
Erin Lillibridge	Intervention Specialist	FCMAT	Central CA
Susana Lopez	Chief Business Official	Moreno Valley USD	Southern CA
Matthew Schulenberg	Assistant Superintendent of Administrative Services/Chief Business Official	Apple Valley USD	Southern CA
Nelly Yang	Assistant Superintendent of Administrative Services/Chief Business Official	Campbell Union SD	Bay Area/Other CA

Tenth Cohort

Name	Title	LEA	Region
Tad Alexander	Associate Superintendent of Statewide & Local Services	Butte COE	Northern CA
Vina Guzman	School Business Consultant	Self-employed	Northern CA
Rebecca Innis (Thomas)	Chief Business Official	Fruitvale ESD	Central CA
LeAnn Jones (Nowlin)	Chief Business Official, Retired	Coalinga-Huron USD	Central CA
Alvina Keyser	Director of Fiscal Services	Lammersville ESD	Northern CA

Victoria Knutson	Chief Business Official	Evergreen ESD	Northern CA
Ed Manansala	Superintendent	El Dorado COE	Northern CA
Scott Martin	Assistant Superintendent of Business Services/ Chief Business Official	Centralia ESD	Southern CA
Mike Mathiesen	Chief Business Official	Mountain View-Los Altos Union HSD	Bay Area/Other CA
Sunny Okeke	Director of Fiscal Services, Retired	Compton USD	Southern CA
David Olney	Superintendent	Hesperia USD	Southern CA
Kirsten Perez	Deputy Superintendent/Chief Financial Officer	Morgan Hill USD	Northern CA
William Pickering	Chief Business Official	Alpine Union ESD	Southern CA
John Quinto	Manager of Business Operations	Fresno USD	Central CA
Donnie Salamanca	Deputy Superintendent/Chief Business Official	Coronado USD	Southern CA
Ami Shackelford	Assistant Superintendent of Business Services/ Chief Business Official	Vista USD	Southern CA
Matthew Shipley	Superintendent	Hart-Ransom Union ESD	Central CA
Trevor Walker	Chief Business Official	Muroc Joint USD	Southern CA

Eleventh Cohort

Name	Title	LEA	Region
Kristi Blandford	Director of Fiscal Services & Payroll	San Juan USD	Northern CA
Jesse Chavarria	Assistant Superintendent of Administrative Services/Chief Business Official	Anaheim ESD	Southern CA
Erin Garcia	Assistant Superintendent of Business Services/ Chief Business Official	San Marcos USD	Southern CA
Alan Giles	Chief Business Official, Retired	Corona-Norco USD	Southern CA
Mike Henkel	Director of Fiscal Services	Buckeye Union ESD	Northern CA
Nikki Herring	Director of Fiscal Services	Salinas City ESD	Bay Area/Other CA
Robert Marical	Chief Business Official, Retired	Cotati-Rohnert Park USD	Northern CA
Amanda Phillips	Assistant Superintendent of Business Services/ Chief Business Official	Escondido Union HSD	Southern CA
Matt Phillips	Director of Management Consulting Services	School Services of CA	Northern CA
Kristen Pifko	Controller	Ventura JPA	Southern CA
Ryan Pinkerton	Assistant Superintendent of Business Services/ Chief Business Official	San Luis Coastal USD	Southern CA
Derek Pinto	Vice President of Finance & Administration	Lasell University	Massachusetts
Richard Ruiz	Director of Business Services	Kern HSD	Central CA
Molly Schlange	School Business Manager/Chief Business Official	University Preparatory School	Northern CA
Ahmad Sheikholeslami	Assistant Superintendent of Business Services/ Chief Business Official	Pleasanton USD	Bay Area/Other CA
Thoraia Soliman	Executive Director of Fiscal Services	Huntington Beach City ESD	Southern CA

Twelfth Cohort

Name	Title	LEA	Region
Monique Benjamin	Director of Accounting & Budgeting	Lawndale ESD	Southern CA
Keith Crafton	Chief Business Official, Retired	Westminster SD	Southern CA
Corbett Elsen	Assistant Superintendent of Business & Operations/Chief Business Official	Tamalpais Union HSD	Northern CA
Nathaniel Holt	Chief Facilities Officer & Bond Program Manager	Compton USD	Southern CA
Rick Jensen	Assistant Superintendent of Business Services/Chief Business Official	Colton Joint USD	Southern CA
Melissa Mercado	Chief Business Official	Eureka Union SD	Northern CA
Silvia Montejano	Chief Financial Officer	Rio Bravo-Greeley Union ESD	Central CA
Mario Rodriguez	Vice Chancellor of Finance & Administration	Los Rios CCD	Northern CA
Manoj Roychowdhury	Chief Business Official	Hacienda La Puente USD	Southern CA
Susan Rutledge	Assistant Superintendent of Business Services/Chief Business Official	Clovis USD	Central CA
Dana Smith	Assistant Superintendent of Business Services/Chief Business Official	Monrovia USD	Southern CA
Philippa Townsend	Assistant Superintendent of Business & Support Services/Chief Business Official	Capistrano USD	Southern CA
Brian Wakefield	Director of Business Services	Mission Valley ROP	Bay Area/Other CA

Thirteenth Cohort

Name	Title	LEA	Region
Lizett Aguilar	Assistant Superintendent of Business Services/Chief Business Official	Sylvan Union ESD	Central CA
Karyl Brandford	Chief Business Official	Charter Oak USD	Southern CA
Manuel Cardoso	Assistant Superintendent of Business Services/Chief Business Official	Westminster SD	Southern CA
Arelis Garcia	Chief Financial Officer	Madera USD	Central CA
Penni Harbauer	Assistant Superintendent of Business Services/Chief Business Official	Beaumont USD	Southern CA
Amer Iqbal	Assistant Superintendent of Administrative Services/Chief Business Official	Los Banos USD	Central CA
Bradley Johnson	Superintendent/Chief Business Official	Dehesa ESD	Southern CA
Janet King	Director of Fiscal Services, Retired	San Bernardino City USD	Southern CA
Rosa Loza	Chief Business Official	Vallejo City USD	Northern CA
Sandra Madera	Director of Fiscal Services	Patterson Joint USD	Central CA
Andrew McGuire	Assistant Superintendent of Business Services/Chief Business Official	Escondido Union SD	Southern CA
Gabe Moulaison	Chief Business Official	Travis USD	Northern CA
Gioconda Padilla	Assistant Superintendent of Business Services/Chief Business Official	Salinas City ESD	Bay Area/Other CA
Brad Pawlowski	Chief Business Official	Paso Robles Joint USD	Central CA
Jordan Reeves	Superintendent	Sierra USD	Central CA
Matthew Richmond	Director of Budget	Fresno USD	Central CA

Cori Shields	Chief Business Official	Lassen Union HSD	Northern CA
Mike Thomson	Business Manager/Chief Business Official	Hope ESD	Southern CA
Raenel Toste	Director of Fiscal Services/Chief Business Official	Newcastle ESD	Northern CA
Amari Watkins	Associate Superintendent of Business Services/Chief Business Official	Davis Joint USD	Northern CA

Fourteenth Cohort

Name	Title	LEA	Region
Kristin Armatis	Director of Fiscal Services	Chula Vista ESD	Southern CA
Gretchen Bergstrom	Director of Fiscal Services	La Canada USD	Southern CA
Heather Brown	Director of Budgetary Accounting	Twin Rivers USD	Northern CA
Mei Chan	Chief Business Official	Las Lomas ESD	Bay Area/Other CA
Kevin Ememaker	Executive Director of Administrative Services	Alvord USD	Southern CA
Dalia Gadelmawla	Assistant Superintendent of Business Services/Chief Business Official	Corona-Norco USD	Southern CA
Norma Gonzales	Assistant Superintendent of Human Resources	Contra Costa COE	Bay Area/Other CA
Tom Gray	Executive Director of Fiscal Services	Pleasanton USD	Bay Area/Other CA
Latasha Jamal	Assistant Superintendent of Business Services/Chief Business Official	Azusa USD	Southern CA
Kilee Lane	Director of Fiscal Services	Washington USD	Northern CA
Mary Navas	Chief Business Official	Scotts Valley USD	Bay Area/Other CA
Amy Nichols	Chief Business Official	Roseland SD	Northern CA
Drew Passalacqua	Assistant Superintendent/Chief Business Official	West Covina USD	Southern CA
Delores Perley	Assistant Superintendent/Chief Business Official	Los Gatos-Saratoga Joint Union HSD	Southern CA
Rob Pierce	Deputy Superintendent	Elk Grove USD	Northern CA
Beth Roberts	Chief Business Official	North Cow Creek ESD	Northern CA
Arleen Sanchez	Chief Business Official	Lake Elsinore USD	Southern CA
Tim Stowe	Superintendent	Torrance USD	Southern CA

Fifteenth Cohort

Name	Title	LEA	Region
Marc Bommarito	Assistant Superintendent of Business Services/Chief Business Official	Menifee Union ESD	Southern CA
Josh Bryant	Accounting Analyst/Chief Business Official	Taft Union HSD	Central CA
Tara Clark	Chief Business Official	Pollock Pines ESD	Northern CA
Jenny Delgado	Assistant Superintendent of Administrative Services/Chief Business Official	Huntington Beach City ESD	Southern CA
Dierk Esseln	Assistant Superintendent of Business Services/Chief Business Official	Arcadia USD	Southern CA
Elvia Galicia	Assistant Superintendent/Chief Business Official	Los Alamitos USD	Southern CA
Melissa Greenwood	Assistant Superintendent of Business & Operations/Chief Business Official	La Canada USD	Southern CA

Gloria Grijalva	Assistant Superintendent of Business Services/ Chief Business Official	Lammersville ESD	Northern CA
Chris Hobbs	Assistant Superintendent/Chief Business Official	Dublin USD	Bay Area/Other CA
Kerri Hubbard	Chief Business Official	Wheatland Union HSD	Northern CA
Michael Kauble	Chief Business Official	Upper Lake USD	Northern CA
Connie Ngo	Chief Business Official	Portola Valley ESD	Bay Area/Other CA
Christian Osmena	Vice President of Enterprise Planning	Arizona State University	Arizona
Karineh Savarani	Director of Financial Services	Glendale USD	Southern CA
Monique Stovall	Assistant Superintendent of Business Services/ Chief Business Official	Washington USD	Northern CA
Harold Sullins	Associate Superintendent Business of Facilities & Operations/Chief Business Official	San Bernardino City USD	Southern CA

Sixteenth Cohort

Name	Title	LEA	Region
Ryan Altemeyer	Associate Superintendent/Chief Business Official	Monterey Peninsula USD	Bay Area/Other CA
Tara Campanella	Chief Business Official	Bass Lake Joint Union ESD	Central CA
Marie dela Cruz	Chief Business Official	Newark USD	Bay Area/Other CA
Sonia Eckley	Assistant Superintendent of Business Services	Bonita USD	Southern CA
Alisha Fogerty	Chief Business Official	Alvord USD	Southern CA
Steven Gragg	Chief Business Official	Taft City SD	Central CA
Ryan Kilby	Chief Operations Officer	Sanger USD	Central CA
Ted O	Assistant Superintendent of Business Services/ Chief Business Official	South San Francisco USD	Bay Area/Other CA
Karen Orr	Executive Director of Fiscal Services	Anaheim Union HSD	Southern CA
Jennifer Passaglia	Chief Business Official	Marysville Joint USD	Northern CA
Ramiro Rubalcaba	Assistant Superintendent of Human Resources	Victor Valley Union HSD	Southern CA
Joel Ryan	Director of Fiscal Services	South Bay Union SD	Southern CA
Pam Smith	Assistant Superintendent of Business & Support Services/Chief Business Official	Sierra Sands USD	Southern CA
Andrew Soliz	Chief Business Official	West Sonoma County Union HSD	Northern CA
Eric Vreeman	Assistant Superintendent of Business Services/ Chief Business Official	Yucaipa-Calimesa Joint USD	Southern CA
Cody Walker	Assistant Superintendent of Business Operations/Chief Business Official	Thermalito Union ESD	Northern CA
Anthony Warnecke	Director III of Fiscal Services	Alvord USD	Southern CA
Lois Yount	Superintendent	Galt Joint Union ESD	Northern CA

Seventeenth Cohort

Name	Title	LEA	Region
Trudy Barrington	Chief Business Official	Dixon USD	Northern CA
Meghna Bulsara	Executive Director of Business Services	Orange USD	Southern CA
Kelly Burks	Assistant Superintendent/Chief Business Official	Vacaville USD	Northern CA
Elena Castillo	Business Manager	Madera USD	Central CA
Lisa Constancio	Senior Deputy Director	State Board of Education	Northern CA
Timothy Golden	Director of Fiscal Services	Ocean View SD	Southern CA
Lanea Grindle	Assistant Superintendent of Business Services/Chief Business Official	Fairfield-Suisun USD	Northern CA
Erica Hays	Director of Business Services/Chief Business Official	La Honda-Pescadero USD	Bay Area/Other CA
Victor Herrera	Chief Business Official	Banning USD	Central CA
Trieste Huey	Director of Fiscal Services	San Bernardino City USD	Southern CA
Hugo Luna	Director of Fiscal Services	Winton SD	Central CA
Jonathan Medina	Fiscal Analyst	Kern Co. Supt. of Schools	Central CA
Dusty Nevatt	Chief Business Official, Retired	Alvord USD	Southern CA
Liz Pensick	Director of Fiscal Services	Chino Valley USD	Southern CA
Dorothy Reconose	Chief Business Official	Metropolitan Education District	Bay Area/Other CA
Preston Thomas	Chief Services & Systems Officer	Oakland USD	Bay Area/Other CA
Kristine Torres	Chief Business Official	Birmingham Charter HS	Southern CA
Charen Yu	Director of Fiscal Services	Palo Alto USD	Bay Area/Other CA

Eighteenth Cohort

Name	Title	LEA	Region
Paulo Azevedo	Executive Director of Maintenance, Operations & Transportation	Menifee Union SD	Southern CA
Keith Bacon	Chief Business Official	Colton-Redlands-Yucaipa ROP	Southern CA
Carolynne Beno	Intervention Specialist	FCMAT	Northern CA
Marc Chaldu	Associate Superintendent of Business & Operations/Chief Business Official	Baldwin Park USD	Southern CA
Kristen Coates	Chief Business Official	Twin Rivers USD	Northern CA
Rick Diaz	Senior Executive Director of Facilities Planning & Construction	North Monterey County USD	Bay Area/Other CA
Regina Freitas	Director of Fiscal Services	Porterville USD	Central CA
Jennifer Frentress	Superintendent	San Carlos ESD	Southern CA
Katie Gonzalez	Director of Fiscal Services	Panama-Buena Vista USD	Central CA
Ryan Hahn	Transportation Consultant	Modesto City Schools	Central CA
Dawn Heraty	Chief Business Official	Sutter UHSD	Northern CA
Matthew Horvath	Assistant Superintendent of Personnel Services	Beverly Hills USD	Southern CA
Susan Ibarra	Assistant Superintendent of Business/Chief Business Official	Lennox USD	Southern CA

Susan Kane	Director of Business Support Services	San Juan USD	Northern CA
Tory Long	Director of Fiscal Services	Santee SD	Southern CA
Brad Minami	Director of Purchasing & Central Services	Anaheim UHSD	Southern CA
Lorelle Mudd	Chief Business Official	Biggs USD	Northern CA
Anne Norris	Chief Business Official	Sebastopol Union SD	Northern CA
Harvey Olsingh	Supervisor of Accounting & ASB Services	Lake Elsinore USD	Southern CA
Lynh Rust	Executive Director of Contracts & Purchasing	Capistrano USD	Southern CA
Benjamin Scinto	Principal	St. Helena USD	Northern CA
Desiree Secrist	Director of Fiscal Services	Greenfield USD	Central CA
Manish Singh	Director of Food Services	Los Angeles USD	Southern CA
Janelle Woodward	Assistant Superintendent of Teaching & Learning	Pleasanton USD	Southern CA

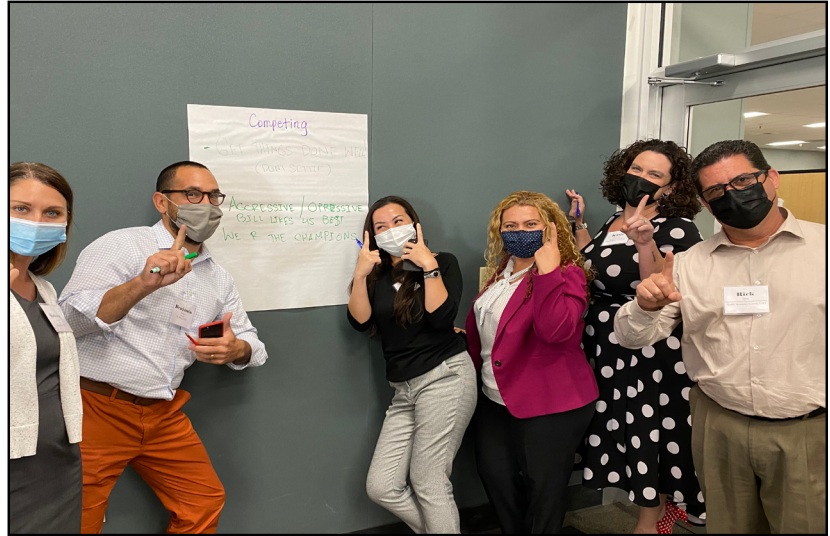


Participants and instructors celebrate the 18th cohort’s graduation from the FCMAT CBO Mentor Program.

What Makes the FCMAT CBO Mentor Program Different?

Several programs provide training and professional learning 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:

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. 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. Classes have core instructors who oversee the course to ensure the following:
 - Presenters are on target and provide a consistent curriculum.
 - Participants are engaged in learning.
 - Core instructors determine if any changes are needed to keep the class on track.
6. The mentor helps the participant prepare for class and reviews the various assignments.
7. No registration or tuition fee is required of participants.
8. Evaluation is an ongoing process.
9. Participants may elect to earn up to nine semester units of university credit through Fresno Pacific University. The cost in 2021-22 was \$80 per unit.



Participants Kristen Coates, Benjamin Scinto, Lynh Rust, Lorraine Perez, Katie Gonzalez and Rick Diaz collaborate on a leadership exercise focused on conflict styles.

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 to help the discussion. 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 can now call on previous graduates to serve as mentors. In 2021-22, 11 of the 25 mentors were former graduates of the FCMAT CBO Mentor Program.

Participant Qualifications

Applicants for 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, human resources, facilities and operations, instruction, charter schools, food services and private industry.

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

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

Course Completion Requirements

Participants are engaged in rigorous study over 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 permitted).
3. Positive evaluations from core instructors and mentor.
4. Satisfactory completion of all assignments and group projects.

Comments from Participants

Several of the 25 participants who successfully completed the 18th 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 18 participants upon graduation:

Thank you to all of you who put in your heart and souls to provide this opportunity for us. I am so grateful to have been a part of Cohort 18!

The class was an excellent learning experience for me. I now have a network of people I can connect with and reach out to for support when needed. Bill and Francie, thank you for so many years of dedication to this program.

I have grown tremendously through this program and will absolutely continue to do so.

I can't thank you all enough for allowing me to be part of this great program. This last year was not easy. This program is hard! But this program is so worth all of the hard work. I have learned and experienced many new things because of this program. I cannot wait to apply what I have learned to future opportunities. Thank you for believing in me and giving me this wonderful opportunity and experience.

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

The FCMAT CBO Mentor Program provided me with the knowledge, skills, and tools to take the next steps in my professional career. I know moving forward that I have an amazing network of instructors and professionals to reach out to continue my development and to stay engaged in the latest in school business.

Guess what the last question was at the final interview with Cabinet? "Tell us a good story about you," and I remembered the assignment you gave us: my creation story. The CBO Program definitely prepared me for the next chapter in my career and taught me to gain confidence in my abilities. I thank you for your guidance and encouragement. I am forever grateful.

I want to share some good news with you! I have accepted a CBO position! Thank you so, so very much for your guidance and support during the mentor program. Without it I would not have had the confidence to take this giant step to be a CBO. With gratitude, and hoping to continue to make you all proud.

You have been ... and continue to be ... a major part of my professional life and journey. I would not be where I am without your support and confidence in me.

I learned many technical skills from this class, but I learned even more about being a leader and the importance of relationships. Thank you!

I wanted to thank you for your dedication to the FCMAT CBO mentoring program. Being part of cohort 15 has been life-changing. I communicate with our group nearly every day (weekends included) through hangouts, where we share everything from our frustrations to our successes. We ask, and share answers, group think through each other's problems. The program and my cohort [have] made my new assignment as the CBO possible. I learned so much in the program, but the continued learning from my colleagues has been amazing.

I'm thankful for the opportunity to participate in the FCMAT CBO Mentor Program, the relationships I built with my mentor, the FCMAT CBO Mentor instructors, and my colleagues are lifelong. The program and the people have made me a better professional and I'm looking forward to paying it forward to our students and community.

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 significant 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- to 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 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 [Bill and Francie].



Participant Ryan Hahn treats the 18th cohort to a spin around the block in his vintage bus, which proudly displays their logo “Save the Best for Last,” in celebration of graduation.

Sequence of Curriculum

The requirements and responsibilities of CBOs in California public schools are detailed and complex. The training of future CBOs must use a curriculum that includes the work of practicing CBOs as well as the leadership aspects of the job.

The FCMAT CBO Mentor Program curriculum is the critical 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.

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, retired 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. Also, 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 responsibilities and role of a CBO.

Course Content, Presenters and Support Team

The 2021-22 FCMAT CBO Mentor Program took place from February 2021 through March 2022 and included three Zoom sessions and 10 weekend in-person training sessions, eight of which were held at the Hilton Garden Inn, Sacramento, one at the CASBO CBO Symposium held in Newport, and one at the Hilton Garden Inn, Irvine. The schedule of classes and instructors is provided on page 26.

FCMAT Deputy Executive Officer Shayleen Harte served as the FCMAT liaison for cohort 18, attending all classes and providing her insights and expertise to the participants as part of the core instructional team.

Richard De Nava served as the mentor coordinator for cohort 18. Richard is a graduate of the program (cohort 2) and serves as assistant superintendent, business services for the San Bernardino County Superintendent of Schools.



SSC's John Gray presents on leadership in school business.



FCMAT CEO Mike Fine acts as the master of ceremony at graduation.

Francie Heim and Bill McGuire served as core instructors for all sessions; they coordinated the curriculum and speakers and taught many of the segments of the curriculum.

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

FCMAT CEO Mike Fine was greatly involved in the program. His presentations on fiscal oversight and how to avoid fiscal crisis were among the most highly rated segments of the program. Mike also leads the midyear evaluation with mentors and participants.

John Gray and members of the SSC team gave presentations on collective bargaining and many other elements critical to the success of a CBO. Danyel Connolley helped participants prepare job application packages and resumes, reviewed their documents, and provided critical feedback. The SSC team attended the final session's discussion about how to apply for a CBO position to help the group improve their interview skills and prepare for their first CBO job.

Participants evaluated all sessions and provided their evaluations to the steering committee for review.

Training Schedule

The training dates are designed to accommodate the participants' work schedules. Classes were held from 1 p.m. to 9 p.m. on Friday and from 8 a.m. to 3 p.m. on Saturday.

Participants were responsible for all travel and lodging costs. All other costs were covered by FCMAT. Most participants' employers helped cover the costs, and scholarships were available for those with limited funds.

FCMAT CBO Mentor Program 18th Cohort 2021-22 Annual Sessions

Session	Date(s)	Topics					
Pre-session Zoom	February 12	Introductions & Program Expectations					
Pre-session Zoom	March 12	Welcome to the Program – Mike Fine, FCMAT	Introduction to JoinMyQuiz tool				
Pre-session Zoom	April 23	StrengthsFinder Overview	LCFF Overview				
1	May 14 & 15	Budget Update – Mike Fine, FCMAT	Budget Crisis & Press Release – Francie Heim	Leadership & Conflict Styles	What it Means to be a CBO – Bill McGuire & CBO Mentor Alumni	Communication – Terilyn Finders	Strengths – Dr. Paul Porter
2	June 5 & 26	Student Achievement – Bill McGuire	School Finance – Francie Heim	Budget Part 1 – Jason Willis	Effective Communication – FCMAT Writers	Working with the Media – Don Zimring	
3	August 6 & 7	Staying Out of Trouble – Mike Fine	LCFF Calculator – Marisa Ploog, FCMAT	Reading Financials – Francie Heim	Budget Part 2 – Jason Willis	Projection-Pro – Andrea Ward, FCMAT	Enrollment Projections – Bill McGuire
4	September 10 & 11	COE Fiscal Oversight – Richard De Nava & Don Gatti	Preparing for Negotiations – Brett McFadden & Francie Heim	Legal Contracts – Harold Freiman	Audit Hunt – Bill McGuire & Francie Heim	Budget Part 3 – Jason Willis & Corbett Elsen	Purchasing & Bidding – Bill McGuire
5	October 15 & 16	History of School Finance – Francie Heim	Resume Prep – Suzanne Speck & Danyel Conolley, SSC	Special Education – Carolyne Beno, FCMAT	Annual Audit – Matt Phillips, SSC	Actuarial Report – Bill McGuire & Francie Heim	Budget Part 4 – Jason Willis
6	November 19 & 20	Midyear Evaluations	Food Service Presentations	Negotiations – John Gray, SSC	Leadership		
7	December 10 & 11	Debt Financing – Lori Raineri	School Finance – Francie Heim	All About Bonds – Bill McGuire	Bond Presentation Project	Facilities Part 1 – Bill McGuire	SpEd Study
8	January 7 & 8	CBO & Technology – Brianne Ford	Budget Update – Kevin Gordon	Budget on the back of a Starbucks Napkin – Bill McGuire & Francie Heim	Working with HR – Don Zimring	Facilities Part 2 – Eric Hall & Lettie Boggs	Leadership – Five Dysfunctions of a Team
9	February 4 & 5	Charter Schools – Cindy Petersen	Medical Benefits – Terri Ezaki	Maintenance & Operations – Bill McGuire	Legal Issues for the CBO – F3	Risk Management – Bill McGuire	HR/ Evaluation – Bill McGuire
10	March 4 & 5	Workers Comp/ Risk Management – Terri Prichard	Transportation – Bill McGuire	Resume Feedback & Interview Practice – SSSC Team	Bond Presentations – Mike Fine, FCMAT	First 100 Days – Bill McGuire	Graduation
Test Prep Zoom	March 15	CASBO Test Prep – Tami Montero & Joel Montero					

Evaluation System

The FCMAT CBO Mentor Program for 2021-22 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 to measure the extent to which curriculum goals and objectives were being met.

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 yearlong 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 participants.

Formative Evaluation, Positive Approach

A 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 can work in an environment of trust and respect that enables them to give honest written feedback on the instructors' performances and 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 as it adapts to meet participants' ongoing needs, while maintaining a commitment to excellence. This approach has resulted in constructive evaluations that promote growth for the overwhelming majority of instructors and participants.



Participants Keith Bacon, Susan Kane, Katie Gonzalez, Lynh Rust, and Brad Minami work together on a leadership activity focused on communication and teamwork.

Colleagues Evaluate

Peer review is an essential element of the FCMAT CBO Mentor Program. When meeting with Mike Fine, the mentors 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.

Often during 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. The program also provides multiple opportunities for writing assignments and evaluations. 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, who set 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.



Participants Kristen Coates, Carolynne Beno and Wendy Frederickson enjoy refreshments at graduation.

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



Core instructor Bill McGuire, FCMAT liaison Shayleen Harte, core instructor Francie Heim and the 18th cohort get ready to kick off the first weekend class.

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 contacting the CASBO CBO certification chairperson and for following the application procedure that CASBO has developed.

Appendix B contains a copy of the FCMAT CBO Mentor Program candidate assessment document. During the candidate assessment, 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. CASBO is developing revised CBO measurement standards and testing, and the FCMAT CBO Mentor Program will adjust the candidate assessment document accordingly.

Participants are rated against measurable standards to determine if they meet or exceed the standard, or if they should pursue additional professional growth to meet it.

If a participant is recommended for CBO certification by his or her mentor, he or she then applies to CASBO for certification. CASBO requires candidates to pass a test before granting the CASBO CBO certification.

If the CASBO certification advisor concurs with the mentor assessment, and the candidate passes the test, the participant will receive the CASBO 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. This 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 a 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 mentors have served in the program since the beginning. The most successful of them 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 on 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:

- Hold the position of CBO or be 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 have demonstrated work experience.
- Have demonstrated performance in developing school business personnel.
- Are committed to providing one-to-one mentoring support to each participant.
- Can 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 it believes 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 participants and provide guidance and support to the participants in person or via email or telephone.
- Respond to a survey monthly from core instructor Bill McGuire that collects feedback about their interaction with participants.
- Monitor assigned projects and provide feedback to the participants.
- Provide an objective evaluation of the participants' progress by providing regular feedback to the participants.
- 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 the strengths and weaknesses of the FCMAT CBO Mentor Program curriculum.
- Attend one of the two orientation sessions (required):
 - Mentor orientation sessions were provided via Zoom.
- Assess the participant's areas of strength and identify areas for growth at the end of the program.
- Mentors are welcome to attend all class sessions. Mentors are especially encouraged to attend at least the first class session, midyear evaluation meeting and graduation.

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. The final award of the CBO certification depends on the decision of the CASBO certification advisor and completion of the CASBO CBO examination.

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 progress in their careers as CBOs.

FCMAT CBO Mentor Coordinator

FCMAT defines a coordinator as *someone who sees that things run harmoniously*. The FCMAT CBO Mentor coordinator, Richard De Nava, is a crucial link between the mentors and the program's leaders, ensuring the flow of communication and information between both groups.

Purpose

The primary 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 concerns that may have been expressed regarding any participants. The coordinator attends the CASBO mentor orientation, CASBO alumni social, the first day of class/mentor orientation, the November midyear review and the 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 mentors' input regarding the program's effectiveness.
- Communicates regularly with mentors about the participants' upcoming projects and timelines.
- Communicates with mentors about whether the participants 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.
- Ensures a 100% return of monthly surveys and follows up with mentors on comments and concerns.

The communication, coordination and support provided by this position are critical elements that ensure 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 learning program. The committee is chaired by FCMAT Chief Executive Officer Mike Fine.

Following is a list of FCMAT CBO Mentor Program steering committee members for the 18th 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
Richard De Nava	Mentor coordinator

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 regularly discuss the strengths and weaknesses of the session.



Core instructors Bill McGuire and Francie Heim, FCMAT liaison Shayleen Harte, and mentor coordinator Richard De Nava.

Budget

The FCMAT board of directors has been involved with and is supportive of FCMAT taking a leadership role in professional learning 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 can attend the workshops, scholarships have been established for any participants for whom travel and lodging costs would present a hardship.

The actual expenditures for the FCMAT CBO Mentor Program 18th cohort (2021-22) were as follows:

FCMAT CBO Mentor Program Cohort #18 Expenditures	
Printing & Supplies	\$3,400
FCMAT Travel and Reimbursement	\$4,086
Room Costs/Alumni Event/Food	\$42,552
Mentor Stipend/Mentor Coordinator	\$56,087
Facilitators/Presenters	\$70,807
Total	\$176,932

Participant and Mentor Applications

These applications are available online and linked to here:

[Participant Application](#)

[Mentor Application](#)

Appendices

Appendix A

FCMAT CBO Mentor Program 18th Cohort 2021-22 Participants

FCMAT CBO Mentor Program 18th Cohort 2021-22 Mentors

Appendix B

FCMAT CBO Mentor Candidate Assessment Form ([link provided to form](#))

Appendix A

FCMAT CBO Mentor Program 18th Cohort 2021-22 Participants

Name	Title	District or Agency
Paulo Azevedo	Executive Director of Maintenance, Operations & Transportation	Menifee Union SD
Keith Bacon	Chief Business Official	Colton-Redlands-Yucaipa ROP
Carolynne Beno	Intervention Specialist	FCMAT
Marc Chaldu	Associate Superintendent of Business & Operations/Chief Business Official	Baldwin Park USD
Kristen Coates	Chief Business Official	Twin Rivers USD
Rick Diaz	Senior Executive Director of Facilities Planning & Construction	North Monterey County USD
Wendy Frederickson	Associate Superintendent of Administrative Services	El Dorado COE
Regina Freitas	Director of Fiscal Services	Porterville USD
Jennifer Frentress	Superintendent	San Carlos ESD
Katie Gonzalez	Director of Fiscal Services	Panama-Buena Vista USD
Ryan Hahn	Transportation Consultant	Modesto City Schools
Dawn Heraty	Chief Business Official	Sutter UHSD
Matthew Horvath	Assistant Superintendent of Personnel Services	Beverly Hills USD
Susan Ibarra	Assistant Superintendent of Business/Chief Business Official	Lennox USD
Susan Kane	Director of Business Support Services	San Juan USD
Tory Long	Director of Fiscal Services	Santee SD
Brad Minami	Director of Purchasing & Central Services	Anaheim UHSD
Lorelle Mudd	Chief Business Official	Biggs USD
Anne Norris	Chief Business Official	Sebastopol Union SD
Harvey Olsingch	Supervisor of Accounting & ASB Services	Lake Elsinore USD
Lynh Rust	Executive Director of Contracts & Purchasing	Capistrano USD
Benjamin Scinto	Principal	St. Helena USD
Desiree Secrist	Director of Fiscal Services	Greenfield USD
Manish Singh	Director of Food Services	Los Angeles USD
Janelle Woodward	Assistant Superintendent of Teaching & Learning	Pleasanton USD

FCMAT CBO Mentor Program 18th Cohort 2021-22 Mentors**Indicates CBO Mentor Program alumni.*

Mentor	Mentor District or Agency	Mentor Location
Michael Bishop	Retired	Southern CA
Keith Butler*	Torrance USD	Southern CA
Lydia Cano	Baldwin Park USD	Southern CA
Karl Christensen*	Santee SD	Southern CA
Javetta Cleveland	Retired	Northern CA
Tina Douglas*	San Dieguito UHSD	Southern CA
Tami Ethier	FCMAT	Central CA
Karen Gosting*	Retired	Northern CA
John Gray	School Services of CA	Northern CA
Eric Hall	Eric Hall & Associates	Southern CA
David Hart	Los Angeles USD	Southern CA
Aaron Heinz*	Colusa COE	Northern CA
Glenn Imke	Panama-Buena Vista USD	Central CA
Steve McClain	Central USD	Central CA
Greg Medici*	San Ramon Valley USD	Bay Area/Other
Denise Porterfield*	Contra Costa COE	Bay Area/Other
Priscilla Quinn	Kern County SOS	Central CA
Liann Reyes*	Santa Cruz COE	Bay Area/Other
Ahmad Sheikholeslami*	Pleasanton USD	Bay Area/Other
Lois Standing	Windsor USD	Northern CA
Philippa Townsend*	Capistrano USD	Southern CA
Darrin Watters	Hemet USD	Southern CA
Dean West	Orange County Dept. of Ed.	Southern CA
William C. Young	Natomas USD	Northern CA
Tim Zearley*	Modesto City Schools	Central CA

Appendix B

[Link to FCMAT CBO Mentor Candidate Assessment Form](#)

Fiscal Crisis and Management Assistance Team
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