

Coaching and Induction Program Annual Report 2022-23

History

School business leadership preparation programs exist in a variety of locations and formats in California. The Fiscal Crisis and Management Assistance Team (FCMAT) pioneered the concept of chief business official (CBO) preparation programs in the early 2000s with the advent of the Chief Business Official Mentor Program. This original preparation program has evolved over time, but has continued its focus on leadership, instructional support in business and finance content, and the inclusion of a mentor who plays a significant role in assisting each participant in professional learning. Over the years, other organizations entered the preparation program arena including significant offerings from the University of Southern California and the California Association of School Business Officials.

All the various CBO preparation programs include a focus on leadership and a high-level exposure to many of the components that make up the role of the CBO. The programs are predominantly seat-time oriented with an expectation of significant work hours away from the classroom. The preparation programs are personal/professional growth opportunities that are focused on the participant level, accommodating people from various backgrounds with expertise that spans a variety of jobs, positions and experience. Between all existing preparation programs, approximately 100 individuals graduate annually. Of those, a smaller percentage actually desire CBO certification, and an even smaller number are prepared to move immediately into the chief business official role without significant and ongoing support. Absent support, a high number of first- through third-year CBOs fail and leave the role altogether, which can have a profound impact on the organizations they serve.

The need for well trained, prepared and actively supported business office professionals in California has never been greater. To mitigate the readiness gap, address the issue of ongoing support, and better insulate school districts from unnecessary turnover in the CBO position, the concept of a second-tier program addressing the needs of first- through third-year CBOs was conceived and began development in 2019. Operating on a proof-of-concept model, FCMAT assisted two new CBOs with limited experience and followed their development while comprehensively identifying their challenges and needs. This work was aligned with skills required as each individual attempted to navigate the annual school district budget calendar. The result of this work helped create what is now the FCMAT Coaching and Induction Program (CIP), which began with its first cohort in July 2022.

CIP Intent

The CIP represents the next level of leadership and support programs and is specifically targeted at individuals who are in their first through third year of being a CBO. The CIP is a natural fit for FCMAT given the organization's statutory responsibility to facilitate training

for chief business officials. The primary focus is on school district and charter school CBOs; however, county superintendent chief business officials are eligible as well. Designed as a year-long program, the format includes an instructional component and a professional coach with continuous opportunities for support and interaction. The curriculum is sequenced to the day-to-day issues a CBO may face during the annual school business cycle, has a specific focus on the FCMAT Fiscal Health Risk Analysis (FHRA), and provides a high-level instructional experience in 12, in-person classes that are scheduled monthly. The overriding purpose of the CIP is to build the CBO's capacity to perform all functions of the job, including making critical resource allocations, fiscal/business calculations, and supporting leadership activities that advance student achievement, educational access, and learning for all students.

A key provision of the CIP includes providing each participant with a well-trained, professional coach. Coaches are practitioners with extensive service in the role of CBO. Coaches meet both individually and with groups of participants and are a professional resource and professional guide with specific practitioner knowledge that allows them to assist in active problem-solving while consistently building the CBO's professional capacity. Coaches support ethical decision-making and model best practices while holding the participants to a high level of professionalism, equity and integrity. Participation in the program requires a financial commitment on the part of the sponsoring district that helps to support the cost of providing coaches. In addition, the program requires the participation of superintendents in active support of their CBO.

The concept of risk and assessing, analyzing and mitigating fiscal risk is a central component of the CIP program. Over the course of the year, participants and coaches use the Fiscal Health Risk Analysis (FHRA) tool to assess the various components of fiscal and organizational risk as they assess systems and processes in their new role as CBO. FCMAT developed the Fiscal Health Risk Analysis as a tool to help evaluate an LEA's fiscal health and risk of insolvency in the current and two subsequent fiscal years. After each CIP session, different sections of the FHRA are explored and assessed for each participant's district. Coaches act as a guide for participants as they implement the FHRA and collect source documentation to validate their responses. This out-of-class activity culminates in a fully completed FHRA at the program's end, progressing to a finished capstone project and a valuable deliverable to the participant's LEA.

The time required to participate in the program varies by individual. At a minimum, each weekend class is approximately 12 hours beginning on Friday afternoon and ending on Saturday. An additional 5-10 hours per week is required to complete sections of the FHRA, meet with coaches, and collaborate with their coaching support group. To help promote ongoing dialogue among participants, coaches, presenters and the program facilitators, the CIP uses online instructional support via Piazza. Piazza is a web-based discussion and organizational portal that maintains all program materials, provides a for question-and-answer feedback, and acts as in immediate problem-solving forum where peers, coaches and facilitators monitor conversations.

While the preparation programs focus primarily on the individual level, the CIP has more of an organizational context. The CIP is not a preparation program. The CIP is intended to build success in currently-seated CBOs and thereby support the LEA's growth and success. The

CIP promotes learning and growth in each participant; however, the goal is district fiscal efficiency, solvency, and support for the learning and education of children.

The program draws participants from throughout California. In the first cohort of the program, the largest district represented was Riverside Unified School District (USD) with approximately 42,000 students, and the smallest LEA was Baker Valley USD with an enrollment of approximately 125. Two-thirds of the participants in year one of the program were in their first year as CBO, and of that number, most were in their first three months on the job. The participant profile included a few people with business office experience; however, many came from other backgrounds such as instruction, facilities, food service, technology, and special education. Regardless, all were seated CBOs who were eager to learn and had an intense desire to support a successful organization.

Cohort One Participants/Districts

Sandra Knight	Orcutt Union School District
Milan Stijepovic	Baker Valley Unified School District
Valerie Mitchell	Oxnard Unified School District
Keith Farrow	Ocean View School District
Terry Cornick	Upland Unified School District
Erin Power	Riverside Unified School District
Robert Irving	Southern Kern Unified School District
Larry Ferchaw	San Gabriel Unified School District
Jonathan Feagle	Winters Unified School District
Chris Hobbs	Dublin Unified School District
Joseph Dougherty	Encinitas Unified School District
Brian Martinez	Grass Valley School District
Victoria Brunn	Manteca Unified School District
Sandra Sturzenacker	Sonora Elementary School District
Amy Banks	Roseville City School District
Marguerite Williams	Inglewood Unified School District
Danny Hillman	Fremont Unified School District

Content

All program instruction follows a hands-on, application-based format. Primary instruction in each topic area is provided by field practitioners who are considered experts in the area selected, who are then supported and prepared by the program facilitators. The content is representative of areas where new CBOs tend to struggle and is designed in a curricular spiral where learning builds on prior skills and concepts that are reinforced using case studies and in-class activities. The program instructional sequence for year 1 follows:

July	Introduction to CIP What is a successful CBO? Introduction of the Fiscal Health Risk Analysis Introduction to Fund Accounting
August	Year End Closing Surviving External Audits Accounting Basics Instruction/Practice
September	The Triangle Position Control, Budget and Payroll Accounting Basics Instruction/Practice
October	Completing the 1st Interim Accounting Basics Instruction/Practice
November	Collective Bargaining Accounting Basics Instruction/Practice
December	Mid-Year Evaluation In Flight Corrections
January	The Governor's Budget An Orientation to Sacramento Agencies: administration, legislature and lobbyist (All district superintendents are invited to attend)
February	Completing the 2nd Interim Assessing and Managing Risk Accounting Basics Instruction/Practice
March	Budget Development AB 1200 Process and Impacts Accounting Basics Instruction/Practice
April	Public Agency Debt Financing Accounting Basics Instruction/Practice
May	Special Education Accounting Basics Instruction/Practice Jun
June	Fiscal Health Risk Analysis Results Closure

The monthly instructional content is augmented by a collection of common threads that run throughout each area of focus and are reinforced consistently during each session. These common threads represent a core of skills without which key business officials cannot be successful. Program presenters are instructed to integrate as many of the common threads into their presentation as is possible. In addition, the program facilitators routinely focus on one or more of these areas during each program session. A list of the common program threads follows:

- Professional Leadership
- Building Professional Networks
- Communication
- Building Basic Accounting Skills
- Fiscal Health Risk Analysis
- Integration of Best Practices
- Problem Solving/Decision Making
- Completion of a Personal Perception Index

Facilitators

The program has two primary facilitators, retired FCMAT Chief Executive Officer Joel Montero, and FCMAT Chief Analyst Tami Montero. FCMAT Deputy Executive Officer Michelle Giacomini also served as a facilitator during the first year of the program and will continue providing overall leadership and coordination for the program as it continues.

The facilitators are the master of ceremonies and conductors of the program. They develop the curriculum, play key communication roles with the participants and coaches, ensure the expert instructors are prepared for the sessions that they will teach, and make certain that the materials that will be presented are appropriate for the sessions. They make sure everything runs smoothly and are supported by Amanda Rosado, Administrative Assistant at FCMAT.

Coaches/Coaching

Successful coaches build capacity, not dependence. This statement is the ongoing mantra of the CIP. In May 2022, the first group of program coaches participated in professional training provided by acknowledged coaching expert, Delia Racines, Ph.D. Throughout the year, Racines spent approximately 12 hours in direct instruction related to the fundamentals of coaching with follow-ups as needed during the year. The assignment of a professional coach, while quite common with certificated administrators, is much less common with classified professionals. As a result, FCMAT had to develop a set of coach expectations and requirements.

To coach in CIP, coaches must meet the program's experience and knowledge as well as agree to maintain the confidentiality of the coaching experience with their participant(s). There is a fine line between serving as a mentor, a coach and assisting participants without taking on work responsibly related to the CBO role. FCMAT requires that each coach meet the following criteria:

- Have recent professional development in coaching strategies and/or be willing to participate in FCMAT-sponsored activities where coaching skills are presented.
- Express interest in coaching CIP participants and be willing to meet regularly with those they coach to help build capacity, expertise, and problem-solving skills.
- Provide support, guidance, and feedback on the participant's development.
- Coordinate with the facilitators related to participant progress.
- Provide a minimum of three hours per month working with each assigned participant.
- Meet with participants individually and in group settings.
- At least once during the year, meet on-site with the CBO and superintendent.
- Monitor the Piazza discussion boards and respond to questions when appropriate.
- Attend at least one in-person session of the CIP each year.

In the first year of the program, participants were assigned to coaches based on a combination of geographical location and district size. The minimum number of participants was

one and the maximum number was four per coach. The names and status of the first year coaching team follows:

Tami Montero*	FCMAT
Matt Phillips	School Services of California, Inc.
Jim Novak	Retired CBO
Jayne Christakos	Retired CBO, industry consultant
Pearl Iizuka	Retired CBO, industry consultant
Robert Shemwell	Retired CBO

*For the first year, FCMAT believed it was important to have one of the facilitators also serve as a coach to ensure the coaching experience was directly connected to the program development and facilitation. Tami Montero served in this dual role.

Funding

FCMAT presented this professional learning opportunity as a component of the organization's professional learning programs supporting personal growth and building organizational capacity focusing on fiscal accountability. The initial planning, program development and the first year's cohort was funded from reserves. The 2023-24 enacted state budget includes funding for cohort two.

The actual expenditures for the FCMAT CIP cohort one (2022-23) totaled \$93,093.

Lessons Learned

With any new or ongoing program, "reading the room" is essential, and the program facilitators are skilled in doing so and empowered to make immediate adjustments to ensure the program is successful for the participants and achieves its purpose. Based on a combination of participant and coach feedback, facilitator observations and experience, the following is an analysis of the program and adjustments that were either implemented during first cohort or that have been incorporated in the second cohort.

- One of the needs of the program is a more comprehensive evaluation protocol.
- The instructional content was aligned with the annual budget calendar. However, staff identified some practical problems in sequencing early in the program. Planning a budget calendar, which was a part of the March session, should have been offered as a part of the first session. Year End Closing, offered in late August, was provided after most districts were well along in closing their books, and that instruction needs to be delivered earlier in the month.
- The program facilitators miscalculated the necessity of offering instruction in accounting basics. The need for a focus on accounting became clear early in the program. The facilitators concluded it was the area that created most of the job stress for many of the new CBOs. Accounting basics will be a part of every session starting in July 2023.

- It took an inordinate amount of time for the participants to bond as a class. This was due to several factors including an attempt by the facilitators to overstructure initial networking activities. As a result, the participants initially did not feel safe to share their skill gaps and professional growth needs. Facilitators miscalculated the impact of this issue and therefore, the bonding time for the participants, and the associated learning suffered during the first quarter of instruction.
- At the January session, the participants were asked to invite their superintendent to attend. There was a great turnout, and this session ended up being one of the most successful of the year. The idea of providing the opportunity to bring a colleague was so powerful, the concept will be expanded. In addition to bringing their superintendent in January, participants may bring a human resources colleague for the November collective bargaining class and a budget director or staff member in March for the session on budget development. This reinforces and builds on the concept that the CBO is not isolated but is part of a larger team.
- Coaches were expected to attend one weekend session during the course of the year. This proved to be somewhat disjointed and did not achieve the intended objective. In the future, all coaches will attend the August session where the details of the FHRA are introduced. There was an operational disconnect between the participants and coaches in this area that should be mitigated by having all of the coaches and participants together during this key introduction of an essential program element.
- The strategy of assigning participants to coaches based on district size and geography did not work as anticipated. Based on coach feedback, participant interaction was far more important than a simple focus on district size. The protocol for coach/coachee assignments will not be like-sized districts in the future.
- Presentation content and style is essential for effective instruction. Despite the expertise of a presenter, presentations can sometimes miss the mark. Using a direct-instruction lecture-oriented format without engaging participants in activity-based learning makes for a difficult session. Developing good hands-on activities that reinforce the instructional content is difficult work and less comfortable for some instructors. As a result, staff have reworked some of the offerings and will work more closely with presenters in their preparation.

Summary and Appreciation

AI involved in the first cohort of FCMAT's new CIP would unquestionably describe it as a success. The program delivered on the proof of the concepts identified during the initial years of study and research, and as noted above, provided a sound basis for future adjustments. As with all new programs, it was not without its challenges and missteps. All the participants successfully completed the program. One person changed districts midyear, and another decided to leave education at the conclusion of the program. The midyear program evaluation by the participants was overwhelmingly positive, and this point of view carried forward to the end of the year.

The participant presentations during the June session related to the culmination of their work on the FHRA were very positive. The idea that the FHRA components could be aligned with the instructional sessions and managed by the participants and coaches to create changes in their districts was a highlight at the end of the year. This impact was powerful.

Yolo County Superintendent of Schools Garth Lewis was instrumental in providing guidance and assistance early in the planning for the program. His support continued by providing conference space for each of the 12 weekend sessions at the Yolo County Office of Education in Woodland. Much thanks and appreciation are extended to Superintendent Lewis and his staff.

Thanks are also extended to the first cohort of participants and coaches who provided essential feedback that will benefit future cohorts. Appreciation is also extended to presenters, panelists and their organizations for giving back to the profession and contributing to the next generation of school business leaders.

Finally, FCMAT acknowledges and thanks our partners and friends at School Services of California, Inc. (SSC). Under the personal dedication and leadership of President and CEO John Gray, SSC attended many sessions, supported participants, provided a coach for the program and delivered some of the most powerful presentations. SSC is a true partner in our work.

More information available at: <https://www.fcmat.org/cbo-coaching>

Links

[FCMAT Coaching Program Mission Statement and Values](#)

[Standards of the FCMAT Coaching and Induction Program](#)

[Participant Application](#)

[Coach Application](#)