

**CBO
Mentor
Program**



A partnership of

**FCMAT
SSC
CCSESA
BASC
CASBO**

CBO Mentor Program

**Fiscal Crisis and Management Assistance Team (FCMAT)
School Services of California (SSC)
California Association of School Business Officials (CASBO)
California County Superintendents Educational Services
Association (CCSESA)
Subcommittee: Business and Administration Steering Committee
(BASC)**

Mentor Application 2015-16 12th Cohort

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

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Purpose

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

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

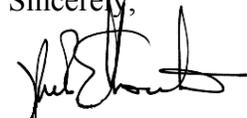
The CBO Mentor Program is a joint endeavor of FCMAT, SSC, CCSESA, BASC, and CASBO. It is our intent through interagency collaboration to assist school districts in filling CBO vacancies throughout California with qualified CBOs. We developed with CASBO a link to the CBO Certification program with the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

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

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

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

Sincerely,



Joel Montero, Chief Executive Officer
Fiscal Crisis and Management Assistance Team

CBO Mentor Program Implementation Timeline Mentor Selection April 2015 - March 2016

I. Application Timeline

- Application and resume (for new mentors only – returning mentors do not need to reapply)
- **Friday, December 12, 2014 by 5:00 p.m.**

- E-mail application and resume to CboMentorMaster@gmail.com.
Questions? Contact Linda Wishart, FCMAT Support Secretary, 755 Baywood Drive, 2nd Floor, Petaluma, CA 94954, (707) 775-2850, lwishart@fcmat.org

IMPORTANT: If you do not receive a confirming email from FCMAT that your application has been received, it is the Mentor’s responsibility to call Linda Wishart (FCMAT) at (707) 775-2850 and resolve email transmission issues that may be impacting FCMATs ability to receive your application package.

II. Selection Timeline

- January 2015 Selection of Participants
- January/February 2015 Selection of Mentors
- February 2015 Notification to Selected Mentors

CBO Mentor Program Primary Qualifications for Mentors

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

CBO Mentor Program
Mentor Application Form
Required if not previously a Mentor in this program
2015-16

Name: _____

Title: _____

Previous Title, if retired: _____

County of Residence: _____

No. of Years as CBO: _____

(COE / District / Community College)

Agency name: _____

Work address: _____

Work phone: _____

Home address: _____

Home phone: _____

Email address: _____

Male Female

1. If still employed, does your superintendent and/or school board support this mentor position?

Yes No N/A

2. Do you commit to a minimum of 8-10 hours per month of one-on-one mentoring with the selected candidate?

Signature _____

CBO Mentor Program Mentor Responsibilities

Training Sessions:

(Required*)

(Requested**)

- * Attendance at One of the Following Two Mentor Orientation Sessions
 - April 2, 2015 Orientation at conference in San Diego, 2:30 p.m. to 3:30 p.m.
 - April 24, 2015 First Meeting Orientation – 11:00 a.m. to 12:00 noon.
- ** Meet and Greet, April 3, 2015
CASBO Annual Conference – San Diego CA
Meet and Greet for all Participants and Mentors and Alumni, 3:30 p.m. to 5:30 p.m.
- ** November 2015 – CASBO CBO Symposium
Mid-year Evaluation: Strengths/Weaknesses Input from Mentors and Participants
- ** March 12, 2016 - Final Class/Graduation/Presentation of Certificates

General Responsibilities:

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

Participate in the following evaluation process:

- Provide objective evaluation of participant’s progress.
A formal evaluation of participants is completed at the end of the program; however, mentors should provide feedback to participants throughout the program. We highly recommend using the CBO Candidate assessment document to provide an informal evaluation of participant’s progress in November.
- Complete all evaluation forms concerning the effectiveness of CBO Mentor Program provided by FCMAT.
- Provide FCMAT with written feedback regarding strengths and weaknesses of CBO Mentor Program curriculum development.
This evaluation process is formally done in November following the CASBO CBO Symposium in a meeting with Joel Montero and CBO Mentor Program leaders. All mentors are strongly encouraged to participate.

Stipends:

- Mentors will receive a one-time stipend of \$1,750 to be paid in March 2016.
 - Stipend includes travel costs

CBO Mentor Program Training Schedule 2015-16

Dates

**Mentor Orientation April 3, 2015
2:30 to 3:30 p.m.**

**Meet & Greet Social
3:30 to 5:30 p.m.**

**April 1, 2015 in conjunction with
CASBO Annual Conference**

Session I	April 24 & 25, 2015 Mentor Orientation 11:00 a.m. to 12:00 noon (alternate date – attend April 1 or April 25) Class starts at noon on Friday*
Session II	June 26 & 27, 2015
Session III	August 7 & 8, 2015
Session IV	September 11 & 12, 2015
Session V	October 9 & 10, 2015
Session VI	November 19,20,21, 2015 CASBO CBO Symposium Location TBD
Session VII	December 11 & 12, 2015
Session VIII	January 8 & 9, 2016
Session IX	February 19 & 20, 2016
Session X	March 11 & 12, 2016
Graduation	March 11, 2016

**First session starts at noon with lunch and welcome on April 24, 2015. All other sessions start at 3 p.m. on Friday.*

Trainings take place from 3 p.m. to 9 p.m. on Friday and from 8 a.m. to 3 p.m. on Saturday.

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

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