

FCMAT CBO Mentor Program

Executive Report

May 2019 – March 2020 · Sixteenth Cohort



A Partnership of

Fiscal Crisis and Management Assistance Team (FCMAT)

School Services of California (SSC)

California Association of School Business Officials (CASBO)

California County Superintendents Educational Services Association (CCSESA)

Subcommittee, Business and Administration Steering Committee (BASC)

PRESENTED TO THE FCMAT BOARD OF DIRECTORS, OCTOBER 4, 2020

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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:

- The joint endeavors of the following organizations along with FCMAT in creating and sustaining the FCMAT CBO Mentor Program: School Services of California (SSC), the California County Superintendents Educational Services Association (CCSESA), the Business and Administration Steering Committee (BASC), and the California Association of School Business Officials (CASBO).
- FCMAT CBO Mentor core instructors Francie Heim, retired deputy superintendent of the El Dorado County Office of Education, and Bill McGuire, retired deputy superintendent of Twin Rivers Unified School District and former superintendent of the St. Helena Unified School District, who provided direct instruction, developed curriculum, assisted in scheduling, and provided mentoring to all participants.
- School Services of California and their team, who provided training on 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 2019, and School Innovations and Achievement for underwriting the CBO Mentor Program participant registration cost.
- The 29 FCMAT CBO mentors, who have provided support and assistance to the newly graduated aspiring CBOs from the cohort of participants.
- The 29 FCMAT CBO Mentor participants, who have completed the rigorous training program. We congratulate them and support their efforts to achieve their career objectives.

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 Chief Business Official (CBO) Mentor Program is one of the professional learning activities initiated by FCMAT in partnership with other educational agencies to improve school district fiscal accountability.

For many years there has been a severe shortage of qualified and trained business officials to 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.

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 in being 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.

2019-20 was the 16th year of the program. Each cohort develops as a team, and participants select a class name. The names, dates, and number of graduates for all FCMAT CBO Mentor cohorts completed to date are as follows:

Cohort Name	Year	Graduates
First Class	2004-05	19
Second to None	2005-06	24
Joel's Favorites	2006-07	27
Fantastic Fourth	2007-08	25
Five Star Leaders	2008-09	23
Six Cents	2009-10	25
Magnificent Seventh	2010-11	23
Elite8	2011-12	23
Nine Lives	2012-13	23
Perfect 10	2013-14	29
11th Hour	2014-15	28
Dynamic Dozen	2015-16	26
13th Alliance	2016-17	30
Unforgettable 14	2017-18	32
Nickel & a Dime	2018-19	26
Sweet 16	2019-20	29

As of March 2020, 412 FCMAT CBO Mentor participants have graduated from the program.

Cohort 17 (Quaran7teen) started in May 2020 and has 27 participants and mentors. Although the class size goal is approximately 25 participants, the selection process continues to be competitive. Many strong candidates were not selected but were encouraged to reapply for cohort 18.

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

Sincerely

A handwritten signature in black ink 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 2019-20 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.

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.



Participants work together to complete a cooperative group activity on school finance.

3. Demonstrated leadership and verbal and written communication skills.

Curriculum Methods

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

Curriculum Delivery

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

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

Why the FCMAT CBO Mentor Program?

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

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



Participants Dio Brache, Andrew Soliz, Joe Ayala, Karen Orr and David Graves work as a table team to complete an exercise related to budgets.

Celebrating Success

Over the past 16 years, an increasing number of graduates from the FCMAT CBO Mentor Program have been employed as CBOs and director positions throughout the state. County offices of education (COEs) have benefited; many of the top leadership roles are held by FCMAT CBO Mentor Program alumni, including the following:

CBO Name

Jared Critchfield	Amador COE
Tad Alexander	Butte COE
Aaron Heinz	Colusa COE
Jeff Napier	Del Norte COE
Tom Snyder	Inyo COE
Jamie Dial	Kings COE
Kate Lane	Marin COE
Renee Hendrick	Orange COE
Martin Fregoso	Placer COE
Lisa Cavin	Plumas COE
Richard De Nava	San Bernardino COE
Scott Anderson	San Joaquin COE
Denise Porterfield	San Mateo COE
Eric Dill	Santa Clara COE
Liann Reyes	Santa Cruz COE
Tommy Welch	Solano COE



FCMAT CEO Mike Fine meets with participants during midyear evaluations at the CBO Symposium.

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

COE Director Name

Julie Brunson	Calaveras COE
Diane Lacombe	El Dorado COE
Roslynne Manasala Smith	El Dorado COE
Gabriel Hall	Fresno COE
Barbara Henderson	Marin COE
Patty Banuelos	Orange COE
Chris Lombardo	Orange COE
Gary Stine	Orange COE
Howard Marinier	Orange COE
Jenny Delgado	Orange COE
Laura Lilley	Placer COE
Kristin Armatas	San Diego 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
Denise Cora	Santa Barbara COE
Diane Baumhover	Tuolumne COE
Debra Hinely	Yolo COE
Veronica Moreno	Yolo COE

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

First Cohort

Name	Title	LEA	Region
Donna Caperton	CBO	Vista USD	Southern CA
Karl Christensen	CBO	Santee SD	Southern CA
Catherine Bojorquez	CBO	Ventura College	Southern CA
Robbie Montalbano	Intervention Specialist	FCMAT	Central
John Von Flue	Chief Analyst	FCMAT	Central
Grace Garner	CBO	Garvey ESD	Southern CA

Second Cohort

Name	Title	LEA	Region
Janelle Bryson	CBO	Sierra USD	Southern CA
Nancy Pfeiffer	CBO	Alisal Union SD	Bay Area/Other
Brad Rohrbach	CBO	Porterville USD	Central

Third Cohort

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

Fourth Cohort

Name	Title	LEA	Region
Jordan Aquino	CBO	Desert Sands USD	Southern CA
Melody Canady	CBO	Santa Monica - Malibu USD	Bay Area/Other
Jayne Christakos	CBO	San Bernardino City USD	Southern CA
Linda Himmel	CBO	Gold Oak Union ESD	Northern CA
Lori Isom	CBO	Central ESD	Southern CA

Gretchen McReynolds	CBO	Vallecito Union SD	Northern CA
Anthony Soria	CFO	Tustin USD	Southern CA

Fifth Cohort

Name	Title	LEA	Region
Leslie Barnes	CBO	Pasadena USD	Southern CA
Kassandra Booth	CBO	Oakdale JUSD	Central
Shawn Cabey	CBO	Westside Union SD	Southern CA
Filipinas Duldulao	Director	San Juan USD	Northern CA
David Flores	CBO	Shasta Union HSD	Northern CA
Brian Hawkins	CBO	Antelope Valley Union HSD	Southern CA
Karen Kimmel	CBO	Las Virgenes USD	Southern CA
Scott Lantsberger	CBO	Colusa USD	Northern CA
Jeff Trader	CFO	Newport Mesa USD	Southern CA
Peter VanBuskirk	Director	Palm Springs USD	Southern CA
Jason Willis	Director	West-Ed	Bay Area/Other

Sixth Cohort

Name	Title	LEA	Region
Carolyn Chow	CBO	Palo Alto USD	Bay Area/Other
Linda Fabre	Assistant Supt. HR	San Bernardino COE	Southern CA
Debbie Fry	Director	School Services of CA	Northern CA
Jennifer Goodner	Budget Manager	Fortuna ESD	Northern CA
Yancy Hawkins	CBO	Novato USD	Bay Area/Other
Gaby Hellier	CBO	Burlingame ESD	Bay Area/Other
Michael Merrill	Superintendent	Summerville Union HSD	Northern CA
Scott Price	Superintendent	Lennox SD	Southern CA
Greg Rash	Director	Twin Rivers USD	Northern CA
Candace Reines	CBO	Perris Union HSD	Southern CA
Todd Rivera	CBO	Tahoe-Truckee USD	Northern CA
Fred Van Vleck	Superintendent	Eureka City Schools SD	Northern CA

Seventh Cohort

Name	Title	LEA	Region
Tina Douglas	CBO	San Dieguito Union HSD	Southern CA
Wael Elatar	CBO	El Monte Union HSD	Southern CA
Joyce Lopes	Vice President	Sonoma State University	Northern CA
Kraig Magnussen	CBO	Kerman USD	Central
Brett McFadden	Superintendent	Nevada JUHSD	Northern CA
Jane Shamieh	Superintendent	Vacaville USD	Northern CA
Debra Silva	CBO	Hart-Ransom Union ESD	Central

Dennis Snelling	CBO	Roseville City ESD	Northern CA
Jennifer Stahlheber	CBO	Calbright Community College	Northern CA
Aaron Thornsberry	CBO	Gateway Charter	Northern CA
Chris Vaz	CBO	Washington USD	Central
Paul Ziegler	CBO	Eureka City Schools SD	Northern CA

Eighth Cohort

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

Ninth Cohort

Name	Title	LEA	Region
Jean Aldrete	CBO	Saratoga Union ESD	Bay Area/Other
Julie Bautista	CBO	Acalanes Union HSD	Bay Area/Other
David Bennett	Assistant Supt. Facilities	Lowell JSD	Southern CA
Keith Butler	CBO	Torrance USD	Southern CA
Ryan Di Guilio	CBO	Fontana USD	Southern CA
Richard Holash	CBO	Buena Park ESD	Southern CA
Erin Lillibridge	CBO	Granada Hills Charter HS	Southern CA
Susana Lopez	CBO	Moreno Valley USD	Southern CA
Greg Medici	CBO	San Ramon Valley USD	Northern CA
Cindy Peterson	CBO	Oakley Union ESD	Central
Luci Rogers	CBO	Coalinga Huron USD	Northern CA
Matthew Schulenberg	CBO	Apple Valley USD	Southern CA
Nelly Yang	CBO	Campbell Union SD	Bay Area/Other

Tenth Cohort

Name	Title	LEA	Region
Vina Guzman	Director	Natomas USD	Northern CA
Alvina Keyser	Director	Lammersville USD	

Victoria Knutson	Director	Morgan Hill USD	Northern CA
Ed Manansala	Superintendent	El Dorado COE	Northern CA
Scott Martin	CBO	Centralia ESD	Southern CA
Mike Mathiesen	CBO	Mountain View-Los Altos Union HSD	Bay Area/Other
Sunny Okeke	Director	Compton USD	Southern CA
David Olney	Superintendent	Hesperia USD	Southern CA
Kirsten Perez	CBO	Morgan Hill USD	Northern CA
William Pickering	CBO	Alpine Union ESD	Southern CA
John Quinto	Director	Fresno USD	Central
Donnie Salamanca	CBO	Coronado USD	Southern CA
Ami Shackelford	CBO	Vista USD	Southern CA
Matthew Shipley	Superintendent	Hart-Ransom Union ESD	Central
Rebecca Thomas	CBO	Fruitvale ESD	Central
Trevor Walker	CBO	Muroc JUSD	Southern CA

Eleventh Cohort

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

Twelfth Cohort

Name	Title	LEA	Region
Corbett Elsen	CBO	Tamalpais UHSD	Northern CA
Keith Crafton	CBO	Westminster SD	Southern CA
Monique Benjamin	CBO	Lennox SD	Southern CA
Rick Jensen	CBO	Colton JUSD	Southern CA

Melissa Mercado	CBO	Eureka Union SD	Northern CA
Silvia Montejano	CBO	Rio Bravo-Greely UESD	Central
Mario Rodriguez	Associate Vice Chancellor	Los Rios CCD	Northern CA
Manoj Roychowdhury	CBO	Santa Ana USD	Southern CA
Susan Rutledge	CBO	Clovis USD	Central
Dana Smith	Director	South Pasadena USD	Southern CA
Philippa Townsend	CBO	Capistrano USD	Southern CA
Joan Velasco	CBO	Fullerton JHSD	Southern CA

Thirteenth Cohort

Name	Title	LEA	Region
Lizett Aguilar	CBO	Sylvan Union ESD	Central
Karyl Brandford	CBO	Charter Oak USD	Southern CA
Manuel Cardoso	Director	Norwalk-La Mirada USD	Southern CA
Arelis Garcia	CBO	Madera USD	Central
Penni Harbauer	CBO	Beaumont USD	Southern CA
Amer Iqbal	CBO	Los Banos USD	Southern CA
Bradley Johnson	Superintendent	Dehesa ESD	Southern CA
Janet King	Director	San Bernardino City USD	Southern CA
Rosa Loza	Director	Vallejo City USD	Northern CA
Sandra Madera	Director	Patterson JUSD	Central
Gabe Moulaison	CBO	Hollister SD	Bay Area/Other
Brad Pawlowski	CBO	Paso Robles JUSD	Central
Jordan Reeves	Superintendent	Gridley USD	Northern CA
Matthew Richmond	Director	Fresno USD	Central
Cori Shields	CBO	Lassen Union HSD	Northern CA
Mike Thomson	CBO	Hope ESD	Southern CA
Raenel Toste	CBO	Newcastle ESD	Northern CA
Amari Watkins	CBO	Davis JUSD	Northern CA

Fourteenth Cohort

Name	Title	LEA	Region
Gretchen Bergstrom	CBO	Sulphur Springs Union SD	Southern CA
Heather Brown	Director	Twin Rivers USD	Northern CA
Rosa Cardona	Director	Kings Canyon JUSD	Central
Mei Chan	Director	New Haven USD	Bay Area/Other
Mark Chaves	Director	Long Beach USD	Southern CA
Kevin Emenaker	Director	Alvord USD	Southern CA
Dalia Gadelmawla	CBO	Corona Norco USD	Southern CA
Norma Gonzales	Assistant Supt. HR	Washington USD	Northern CA

Tom Gray	Director	Pleasanton USD	Bay Area/Other
Latasha Jamal	CBO	Azusa USD	Southern CA
Kilee Lane	Director	Washington USD	Northern CA
Mary Navas	CBO	Scotts Valley USD	Bay Area/Other
Drew Passalacqua	CBO	West Covina USD	Southern CA
Delores Perley	CBO	Los Gatos-Saratoga Union HSD	Southern CA
Rob Pierce	CBO	Elk Grove USD	Northern CA
Beth Roberts	CBO	Happy Valley/North Cow Creek	Northern CA
Arleen Sanchez	CBO	Lake Elsinore USD	Southern CA
Tim Stowe	Superintendent	Torrance USD	Southern CA

Fifteenth Cohort

Name	Title	LEA	Region
Marc Bommarito	CBO	Covina Valley USD	Southern CA
Josh Bryant	CBO	Taft Union HSD	Central
Tara Clark	CBO	Pollick Pines ESD	Northern CA
Dierk Esseln	CBO	Arcadia USD	Southern CA
Elvia Galicia	Director	Los Alamitos USD	Southern CA
Melissa Greenwood	Director	Fullerton ESD	Southern CA
Gloria Grijalva	CBO	Lammersville USD	Northern CA
Chris Hobbs	Interim CBO	Dublin USD	Bay Area/Other
Kerri Hubbard	CBO	Orland JUSD	Northern CA
Michael Kauble	CBO	Upper Lake USD	Northern CA
Anthony Martinez	Superintendent	Montebello USD	Southern CA
Connie Ngo	CBO	Portola Valley ESD	Bay Area/Other
Karineh Savarani	Director	Glendale USD	Southern CA
Nicolas Schweizer	Chief Finance/Admin. Officer	Calbright Community College	Northern CA
Monique Stovall	CBO	Dixon USD	Northern CA
Harold Sullins	CBO	Rosemead ESD	Southern CA

Sixteenth Cohort

Name	Title	LEA	Region
Ryan Altmeyer	CBO	Monterey USD	Bay Area/Other
Dio Brache	Director	Buena Park ESD	Southern CA
Tara Campanella	CBO	Bass Lake JUESD	Central
Marie dela Cruz	CBO	Newark USD	Bay Area/Other
Sonia Eckley	Director	Bonita USD	Southern CA
Alisha Fogerty	Director	Perris UHSD	Southern CA
Steven Gragg	CBO	Taft City SD	Central
Ryan Kilby	COO	Sanger USD	Central

Ted O	CBO	South San Francisco USD	Bay Area/Other
Karen Orr	Controller	Anaheim Union SD	Southern CA
Jennifer Passaglia	Director	Marysville JUSD	Northern CA
Ramiro Rubalcaba	Assistant Supt. HR	Victor Valley Union HSD	Southern CA
Joel Ryan	Director	South Bay Union SD	Southern CA
Pam Smith	CBO	Sierra Sands USD	Southern CA
Eric Vreeman	CBO	Yucaipa-Calimesa JUSD	Southern CA
Cody Walker	CBO	Thermalito UESD	Northern CA
Anthony Warnecke	Director	Corona-Norco USD	Southern CA
Lois Yount	Director	Galt JUESD	Northern CA

What Makes the FCMAT CBO Mentor Program Different?

Several programs currently 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. One-on-one mentors must meet designated criteria and be approved by the steering committee. Mentors typically have ten or more years of experience as a successful CBO in the California public school system.
4. Classes are designed to be interactive. Participants are required to complete several major projects.
5. The classes have core instructors who oversee the course to ensure that:
 - Presenters are on target and provide a consistent curriculum.
 - The participants are engaged in learning. Core instructors determine if any changes are needed to keep the class on track.
 - The mentor helps the participant prepare for class and reviews the various assignments.
6. No registration or tuition fee is required of participants.



Core instructor Bill McGuire gives direction to participants concerning a negotiations exercise at the CBO symposium.

7. Evaluation is an ongoing process.
8. Participants may elect to earn up to nine-semester units of university credit through Fresno Pacific University. The cost in 2019-20 was \$80.00 per unit.

Mentor Experience and Commitment

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

Because of the longevity of the program, its leaders are now able to call on previous graduates to serve as mentors in the program. In 2019-20, 13 of the 29 mentors were graduates of the program.

Participant Qualifications

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

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

- Involved in some facet of school business (desirable but not required)
- School finance
- Computer literacy
- Sensitivity to confidential issues
- Logical thinking skills
- Analytical abilities
- Facilitation skills
- Leadership
- Supervision
- Interpersonal skills; 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 allowed, but participants are asked to attend a make-up session during the next cohort).
3. A positive evaluation from mentor and core instructors.
4. Satisfactory completion of all assignments and group projects.

Comments from Participants

Several of the 29 participants who successfully completed the 16th 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 16 participants upon graduation:

The FCMAT CBO program is one of the best programs I have ever been a part of. The lessons learned in regard to leadership and fiscal resource management are at the caliber of a doctoral program. This experience, thanks to Bill, Francie, Mike, and the rest of the team, has had a positive impact on my personal and professional life! Thank you!

Thank you for allowing me to be part of this program. I have learned so much and have made so many lifelong friendships and connections. Thank you, again and again.

I am so grateful for the opportunity to learn from such amazing leaders in the area of business. Thank you for all of your mentorship, guidance, and laughs. I hope our paths continue to cross in the future.

This program was amazing, two phenomenal teachers with so much experience and a host of great teachers, I feel blessed to have been part of it. I have 28 friends for life!

Words can't express my gratitude to all of the instructors, my fellow participants, my mentor Eric Hall, and especially Bill, Francie, and Shayleen for the incredibly hard work and amazing perspectives you 3 bring to the program!

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

Comments from Previous Graduates

I 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 has made my new assignment as the CBO in Covina-Valley possible. I learned so much in the program, but the continued learning from my colleagues has been amazing.

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

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

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.



Participants Anthony Warnecke, Pamela Smith, Andrew Soliz, Terry Cornick and Stephanie Bruce participate in a role playing exercise involving negotiations.

2019-20 Mentors and Participants by Geographic Location

- ◆ Mentors
- ▲ Participants



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, what a CBO is required to know, and how to perform required tasks.

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.

Available online via links in this report is a [summary of assignments and activities for the 16th cohort program year](#). The entire curriculum and all participant assignments are posted to a Google Drive site that is password-protected but available for review upon request.

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

Course Content, Presenters and Support Team

The 2019-20 FCMAT CBO Mentor Program took place from May 2019 through March 2020 and included 10 training sessions; eight sessions were held at the Hilton Garden Inn, Sacramento, one at the California Association of School Business Officials (CASBO) CBO Symposium held in Newport Beach, and one at the Hilton Garden Inn, Irvine. A schedule showing all of the classes and instructors is provided below on page 22.



FCMAT technical writer Leonel Martinez discusses a writing assignment with participants.

FCMAT Deputy Executive Officer Shayleen Harte served as the FCMAT liaison for cohort 16, 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 16. Richard is a graduate of the program (cohort 2) and currently serves as assistant superintendent, business services for the San Bernardino County Superintendent of Schools.

Francie Heim and Bill McGuire served as core instructors for all ten 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.

Mike Fine, CEO of FCMAT, was a significant presence 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 attends the November class session and leads the midyear evaluation with mentors and participants.

John Gray and members of the SSC team gave presentations in October and February on collective bargaining and many other elements critical to the success of a CBO. Suzanne Speck and Debbie Fry of SSC helped participants prepare job application packages and resumes, reviewed their documents, and provided critical feedback. For the last session's discussion of how to apply for a CBO position, the SSC team were present to help the group improve interview skills and prepare for their first CBO job.

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

Training Schedule

The training dates are designed to accommodate the participants' work schedules. Classes were held from 3 to 9 p.m. on Friday and from 8 a.m. to 3 p.m. on Saturday. Also, there were many optional sessions from 1 to 3 p.m. on Friday that allowed participants to receive more in-depth training on specific topics. Most participants attended these sessions.

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

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



Presenter Terilyn Finders talks to participants about best practices for communication and community relations.

FCMAT CBO Mentor Program 2019-20 16th Cohort Master Schedule

	1	2	3	4	5	6	7	8	9	10
1:00 to 2:45	May 3 & 4 2019	June 21 & 22 2019	August 9 & 10 2019	September 6 & 7 2019	October 4 & 5 2019	November 22 & 23 2019	December 6 & 7 2019	January 3 & 4 2020 Irvine	February 7 & 8 2020	March 6 & 7 2020
3:00 to 4:00		LCFF Details Francie Heim	Preparing for Negotiations Francie & Brett McFadden	In depth Fiscal Tami Ethier	In depth Fiscal Tami Ethier	CASBO Symposium	Mid Year meetings	Special Ed. Finance Francie Heim	Charters Cindy Petersen	Workers Comp. Terri Prichard
4:00 to 5:00		School Finance Francie Heim	LCAP FCMAT Team	COE Fiscal Oversight Richard De Nava and COE Team	Special Ed. Carolynne Benno	Mid Year Evaluation Mike Fine and team	Bond Issue session	Budget Update and Leadership	Medical Benefits Terri Ezaki	CASBO Testing
5:00 to 6:00	Opening day starts at 12:00 and ends at 8:30 Mike Fine and CBO Mentor Team	Working Dinner	Working Dinner	Working Dinner	SSC Resume Review & Working Dinner	Working Dinner	Debt Financing Lori Raineri	Starbucks Exercise	Working Dinner	Resume Feedback SSC
6:00 to 7:00		Budget Presentation Bill McGuire Jason Willis Corbett Eisen	LCFF FCMAT Team	Legal Contracts Harold Freiman	Annual Audit Matt Phillips, SSC	Food Service Presentation	Bond Issue - How to. Bill McGuire	Working with HR Don Zimring	Maintenance & Operations & Transportation Bill McGuire	Bond Project Presentation Mike Fine
7:00 to 8:00		Leadership	Staying out of Trouble Mike Fine	TRUSD Audit Hunt Francie Heim	Actuarial Report Francie Heim		Working Session Bonds		Technology Presentations	Leadership
8:00 to 9:00		Saturday	Saturday	Saturday	Saturday	Saturday	Saturday	Saturday	Saturday	Saturday
	Communication Terilyn Finders	Presentations Budget Update Kevin Gordon	School Finance Francie Heim	Budget Part 1 Bill McGuire & Jason Willis	Fiscal with Francie Leadership	Mentor Q	Bond Presentations	Starbucks Redux	Legal Aspects of the Job Diane Marshall Freiman	Applying for the Position of CBO & First 100 days Bill McGuire & Alumni
10:00 to 12:00	Fiscal Crisis Project Francie Heim	FCMAT Writers	Enrollment Projections Bill McGuire	Budget Part 2 Bill McGuire & Jason Willis	Budget Part 2 Bull McGuire & Jason Willis	Budget Part 3 Jason & Bill	Facilities Part 1 Financing & Bonds Bill McGuire	Facilities Part 2 Eric Hall & Lettie Boggs	CBO Leadership SSC Team	Lunch
12:00 to 1:00	Working Lunch	Lunch	Working Lunch	Working Lunch	Working Lunch	Working Lunch	Working Lunch Mentor Q	Working Lunch	Working Lunch	Lunch
1:00 to 2:00	Strengths & Leadership with Paul Porter	Working with the Media Don Zimring	Budget Project Francie Heim	Purchasing & Bidding Bill McGuire	Budget Bill McGuire & Jason Willis	Special Assignment	Technology Michael Dodge	Facilities Part 2 Leadership	Human Resources Bill McGuire	Graduation
2:00 to 3:00		Closing								

Evaluation System

The FCMAT CBO Mentor Program for 2019-20 established clear goals and objectives. To measure effectiveness and ensure accountability, the FCMAT CBO Mentor Program steering committee designed and established evaluation procedures to assess desirable instructor characteristics and measure the extent to which curriculum goals and objectives were being met.

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

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

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

Mentors are asked to complete an evaluation before each session and provide immediate feedback on their interaction with their 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 are able to 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 and commitment to excellence as it adapts to meet participants' ongoing needs. This approach has resulted in constructive evaluations that promote growth for the overwhelming majority of instructors and participants.



Participants Alisha Fogerty, Jennifer Passaglia, Brook Porteous, Eric Vreeman and Ted O, along with mentor Vince Christakos, listen for further instructions during a team building/leadership exercise.

Colleagues Evaluate

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

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. Also, the program 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, which 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.

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

Midyear evaluation elements:

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

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



All CBO Mentor Program 16th Cohort participants at graduation with core instructors Bill McGuire and Francie Heim as well as Mentor Coordinator Richard De Nava, FCMAT Liaison Shayleen Harte and FCMAT CEO Mike Fine.

Candidate Assessment

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

Appendix B contains a copy of the FCMAT CBO Mentor Program candidate assessment document. In the candidate assessment process, the FCMAT CBO Mentor Program participant and mentor meet, and the mentor rates the participant's skills and recommends the participant for either CASBO CBO certification or additional study. CASBO is currently developing revised CBO measurement standards and testing, and the FCMAT CBO Mentor Program will adjust the candidate assessment document accordingly.

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

If a participant is recommended by their mentor for CBO certification, they apply to CASBO for certification. CASBO currently requires candidates to pass a test before granting of CASBO CBO certification.

If the CASBO certification advisor concurs with the mentor assessment, and the candidate passes the test, the participant will receive CBO certification.

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

FCMAT CBO Mentors

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

Purpose

Mentors work with their assigned participants throughout the program. They review and provide input 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:

- Currently, hold the position of CBO or are actively involved as a retired CBO.
- Have extensive experience as a CBO, typically ten years or more.
- Have hands-on experience in all facets of school business operations.
- Hold a degree in a business-related field, CBO certification, or demonstrated 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 they believe will be a good match as a mentor for a particular participant.

Mentor Responsibilities

Mentors are expected to do the following:

- Be available to the participant and provide guidance and support to the participant via email, telephone, or in person. Core instructor Bill McGuire sends out a survey monthly and collects feedback from mentors about their interaction with participants.
- Monitor assigned projects and provide feedback to the participant.
- Provide an objective evaluation of the participant's progress by providing regular feedback to the participant.
- Participate with FCMAT in a joint evaluation of the program at the November meeting.
- Complete all evaluation forms regarding the effectiveness of the FCMAT CBO Mentor Program, as requested by FCMAT.

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

CASBO CBO certification is not automatic: at the end of the program, the mentor makes a recommendation to the CASBO certification advisor regarding whether the participant should receive CBO certification. The mentor may recommend that the participant take additional classes to become qualified. 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 move forward in their careers as CBOs.

FCMAT CBO Mentor Coordinator

A coordinator is defined as *someone who sees that things run harmoniously*. The FCMAT CBO Mentor coordinator, 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 graduation.

Responsibilities

The FCMAT CBO Mentor coordinator does the following:

- Proposes initial assignment of mentors to participants for the steering committee, based on geographic location and reasonable accommodation.
- Meets with mentors at the initial orientation and at the midyear evaluation to review their responsibilities and the program's expectations of them; seeks their input regarding the program's effectiveness.
- Communicates regularly with mentors about the participants' upcoming projects and timelines.
- Communicates with mentors at the conclusion of the program to seek their input regarding the program's effectiveness, and provides input regarding whether their participant should be recommended for CASBO CBO certification.
- Is available to mentors and responds to their questions and concerns.
- Is available to participants in the event of problems with their mentors.

- Participates as a member of the steering committee.
- Receives and maintains a file of annual candidate assessment documents at the completion of each cohort.
- Follows up with mentors to ensure a 100% return of monthly surveys and follow up on comments and concerns.

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

Steering Committee

The primary purpose of the FCMAT CBO Mentor Program steering committee is to serve in an advisory role to FCMAT, which funds the program through its professional 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 16th 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 are debriefed to determine the strengths and weaknesses of the session.

Budget

The FCMAT board of directors has been very involved and is supportive of FCMAT taking a leadership role in professional 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 are able to attend the workshops, a process for scholarships has been established for any participants for whom travel and lodging costs would present a hardship.

The actual expenditures for the FCMAT CBO Mentor Program 16th cohort (2019-20) were as follows:

FCMAT CBO Mentor Program, Cohort 16 Expenditures		
Printing & Supplies	\$	6,041
FCMAT Travel and Reimbursement	\$	7,427
Room Costs/Alumni Event/Food	\$	44,122
Mentor Stipend/Mentor Coordinator	\$	52,675
Facilitators/Presenters	\$	69,857
Total	\$	180,123

Participant and Mentor Applications

These applications are available online and linked to here:

[Participant Application](#)

[Mentor Application](#)

Appendices

Appendix A

FCMAT CBO Mentor Program 2019-20 Participants

FCMAT CBO Mentor Program 2019-20 Mentors

Appendix B

FCMAT CBO Mentor Candidate Assessment Form

Appendix A

FCMAT CBO Mentor Program 16th Cohort Participants

Ryan Altmeyer • Associate Superintendent, Business Services • Monterey Peninsula USD

Joe Ayala • Director of Information Technology • Santa Clara USD

Amy Banks • Director of Ed Services • Roseville City SD

Traci Bonde • Director of Instructional Technology • Los Gatos-Saratoga JUHSD

Dio Brache • Director of Fiscal Services • Buena Park SD

Stephanie Bruce • Director, Nutrition Services • Palm Springs USD

Tara Campanella • Director of Business Services • Bass Lake Joint UESD

Terry Comnick • Director, Categorical Programs • San Bernardino City USD

Marie dela Cruz • Chief Business Official • Newark USD

Sonia Eckley • Senior Director of Fiscal Services • Bonita USD

Alisha Fogerty • Director of Fiscal Services • Perris UHSD

Steven Gragg • Chief Business Official • Taft City SD

David Aaron Graves • Chief Business Officer • Santa Rosa Academy

Leonard Hernandez, Jr. • Director of Facilities, Maintenance & Operations • Pomona USD

Ryan Kilby • Chief Operations Officer • Sanger USD

Ted O • Assistant Superintendent, Business Services • South San Francisco USD

Karen Orr • Controller • Anaheim UHSD

Jason Osborn • Executive Director MOT • Temecula Valley USD

Jennifer Passaglia • Director of Fiscal Services • Marysville Joint USD

Brooke Porteous • Supervisor of Payroll and Benefits • Twin Rivers USD

Ramiro Rubalcaba • Assistant Superintendent • Victor Valley UHSD

Joel Ryan • Director of Fiscal Services • South Bay Union SD

Pamela Smith • Assistant Superintendent of Business • Sierra Sands USD

Andrew Soliz • Director of Child Nutrition Services • San Mateo-Foster City SD

Heather Steer Leslie • Director of Facilities and Financial Planning • Capitol Public Finance Group

Dr. Eric Vreeman • Assistant Superintendent, Business Services • Yucaipa-Calimesa Joint USD

Cody Walker • Assistant Superintendent, Business & Operations • Thermalito UESD

Anthony Warnecke • Payroll Director • Corona-Norco USD

Lois Yount • Director of Business Services • Galt Joint UESD

FCMAT CBO Mentor Program 16th Cohort Mentors

Wendy Benkert • Orange COE (retired)
Michael Bishop • Los Angeles area (retired)
Terry Bradley • Clovis (Fresno)
Janelle Bryson* • Sierra USD
Keith Butler* • Torrance USD
Lydia Cano • Baldwin Park USD
Vince Christakos • Hemet USD (retired)
Jayne Christakos* • San Bernardino USD
Javetta Cleveland • Natomas USD
Susan Cross Hume • Bonita USD
Eric Dill* • Santa Clara COE
Tami Ethier • FCMAT
Karen Gosting* • Orland USD (retired)
John Gray • School Services of California
Eric Hall • San Diego area (retired)
Rick Holash* • Buena Park SD
Brett McFadden* • Nevada JUHSD
Jim Novak • Santa Clara COE (retired)
Lori Ordway-Peck • Temecula Valley USD
Raul Parungao • Alameda COE (retired)
Nancy Pfeiffer* • Campbell UHSD
Denise Porterfield* • San Mateo COE
Linda Protine • Sutter COE (retired)
Priscilla Quinn • Kern County Superintendent of Schools
Candace Reines* • Perris UHSD
Dennis Snelling* • Roseville City SD
Aaron Thornsberry* • Gateway Charter Sacramento
John Von Flue* • FCMAT
Darrin Watters • Hemet USD

* indicates CBO Mentor Program alumni

Appendix B

Link to Candidate Assessment Form

Fiscal Crisis and Management Assistance Team
1300 17th Street-City Centre
Bakersfield, CA 93301
661-636-4611 • www.fcmat.org