

**FCMAT  
CBO  
Mentor  
Program**



*A partnership of*

**FCMAT  
SSC  
CCSESA  
BASC  
CASBO**

**FCMAT CBO Mentor Program**

*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)**

**Participant  
Application  
2020-21  
17<sup>th</sup> Cohort**

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

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## **FCMAT CBO Mentor Program**

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## Purpose

The FCMAT Chief Business Official (CBO) training program aims to produce qualified California school district CBOs. This one-year program provides classroom training that takes place in 10 sessions (Friday afternoon and evening, Saturday). Mentors 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 competitive
- 3) Training involves hands-on experience
- 4) Tuition is at no cost to participants  
(FCMAT underwrites the cost of this professional learning activity)

The FCMAT CBO Mentor Program is a joint endeavor of FCMAT, SSC, CCSESA, BASC, and CASBO. It is our intent through interagency collaboration to help school districts throughout California fill CBO vacancies with qualified CBOs. FCMAT and CASBO developed a link to the CASBO CBO Certification program, with the intent that a successful participant may receive CASBO CBO certification, depending on their mentor evaluation in coordination with CASBO's certification, examination 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 learning opportunity. A typical CBO Mentor cohort has 25 participants from all regions of California and with various backgrounds ranging from directors of business services to school principals to individuals in private industry seeking to transition into school business leadership positions. The process is competitive, and if you are not selected in a given year we encourage you to apply in the following year.

FCMAT is pleased to present this professional learning activity in relationship with other professional trainings focusing on fiscal accountability.

Sincerely,



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

# FCMAT CBO Mentor Program Implementation Timeline 2020 - 2021

## I. Application Timeline

- Application, resumé and nomination form are due **Friday, December 13, 2019 by 5 p.m.**

Please submit all documents together. Incomplete applications will not be accepted.

Email application with essay question, resumé, and nomination form to [ChoMentorMaster@gmail.com](mailto:ChoMentorMaster@gmail.com).

Questions? Contact: Francie Heim (530) 313-8516

**IMPORTANT: If you do not receive a confirming email that your application has been received, it is the applicant's responsibility to resolve email transmission issues that may be affecting FCMAT's ability to receive your application package.**

## II. Selection Timeline

- January 2020 - Selection of participants
- January 2020 - FCMAT Board of Directors approval of participants
- February 2020 - Notification of selected participants

## **FCMAT CBO Mentor Program Participant Qualifications**

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

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

### **Selection Process**

Participants are selected based on a variety of factors. The selection committee looks at the strength of the application and the strength of the nomination, and seeks a balance of candidates from northern, southern, and central California. It is also a program goal to have a balance of small and large districts, and that private industry, county offices and charter schools are represented. Many candidates come from the business side of schools, but the program also seeks representation from facilities, food services, instruction, operations and technology. If a candidate is not selected, it does not necessarily mean that they are not a viable candidate. Candidates may reapply in the following year and are encouraged to do so. A large number of qualified candidates compete for a limited number of slots each year.

# FCMAT CBO Mentor Program Participant Application Form 2020-21

**Please email your application (completed questions), nomination form and current resumé by 5 p.m. on Friday December 13, 2019. All documents are required to make this a valid application. Incomplete applications will not be accepted.**

- **IMPORTANT:** If you do not receive a confirming email that your application has been received, it is the applicant's responsibility to resolve email transmission issues that may be affecting FCMAT's ability to receive your application package. Call Francie Heim, Lead Instructor, at (530) 313-8516 if you have any questions.

Required Documents:

- Participant application form with essay question
- Nomination form
- Current resumé

Name: \_\_\_\_\_

Current title/# of years: \_\_\_\_\_ / \_\_\_\_\_

Previous title/# of years: \_\_\_\_\_ / \_\_\_\_\_

Current LEA/district/county office or charter school (if applicable): \_\_\_\_\_

Size of LEA (ADA): \_\_\_\_\_ County where LEA is located: \_\_\_\_\_

Agency name: \_\_\_\_\_

Work address: \_\_\_\_\_

Work phone: \_\_\_\_\_

Email address: \_\_\_\_\_

Male  Female

1. Do you have superintendent/school board approval to participate in this program?  
 Yes  No
2. Do you anticipate that your district will pay travel and lodging costs?  
(Note: the cost of the training itself is underwritten by FCMAT)  
 Yes  No
3. Are you a member of CASBO?  Yes  No

**Essay Question**

**Please answer the following questions. Your response should be at least 500 words, but do not exceed 1,000 words.** Why are you interested in participating in the CBO Mentor program? What strengths do you bring to the program and to your future position of CBO? How do you plan to balance your existing workload with the demands of this intensive CBO training program? Why are you the best candidate for us to consider?

# FCMAT CBO Mentor Program Nomination Form

2020-21

*To be completed by someone other than the participant.*

**COMPLETE AND RETURN BY FRIDAY DECEMBER 13, 2019**

Person you are nominating: \_\_\_\_\_

Name of nominator: \_\_\_\_\_

Title: \_\_\_\_\_

Agency name: \_\_\_\_\_

Work address: \_\_\_\_\_

Work phone: \_\_\_\_\_ Email address: \_\_\_\_\_

1. Why do you think this individual would make an excellent candidate for the CBO Mentor Program?
2. Referencing the required qualifications, what are the strengths of this individual? (This will also help team this participant with a mentor.)
3. What are the areas of identified potential growth for your nominee to become a CBO?
4. Do you have a suggestion for a person you recommend to serve as your nominee's mentor?
5. Where do you assume this candidate will be a CBO five years from now (small, medium, large district)?



# **FCMAT CBO Mentor Program Training Schedule 2020-21**

**CASBO Annual Conference • Palm Springs  
March 29, 2020  
4:30 to 6:30 p.m. Meet & Greet Social**

<b>Session I</b>	<b>May 15 &amp; 16, 2020*</b>
<b>Session II</b>	<b>June 26 &amp; 27, 2020</b>
<b>Session III</b>	<b>August 7 &amp; 8, 2020</b>
<b>Session IV</b>	<b>September 4 &amp; 5, 2020</b>
<b>Session V</b>	<b>October 2 &amp; 3, 2020</b>
<b>Session VI</b>	<b>November 19-21 CASBO CBO Symposium (location TBD)</b>
<b>Session VII</b>	<b>December 4 &amp; 5, 2020</b>
<b>Session VIII</b>	<b>January 8 &amp; 9, 2021**</b>
<b>Session IX</b>	<b>February 5 &amp; 6, 2021</b>
<b>Session X</b>	<b>March 5 &amp; 6, 2021 Mentors are invited to Graduation</b>

\* *First session starts at noon with lunch and welcome on May 15, 2020.*

\*\* *The January session will be held at the Hilton Garden Inn in Irvine, CA.*

Trainings take place from 3 to 9 p.m. on Friday and from 8 a.m. to 3 p.m. on Saturday. Participants are offered optional in-depth sessions from 1 to 3 p.m. on Friday. All participants typically attend the optional sessions.

All sessions except the November and January sessions 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.