



A California Public Benefits Corporation

Corporation formed September 19, 2019

Corporation Number 4319346

Internal Revenue Service Approved Exempt Federal Income Tax

Donations tax deductible to the fullest extent allowed by law.

**7 Board Minutes, Saturday, March 13, 2021**

For effective oversight

**MINUTES QUARTERLY BOARD OF DIRECTORS MEETING MARCH 13, 2021**

**\$180.8 Billion Proposition 39 School Bonds approved by voters <sup>1</sup>**

CABOC website: [www.bondoversight.org](http://www.bondoversight.org)

**Purpose Statement:** “The specific purpose of this corporation is to provide training, assistance, and encouragement to California School Proposition 39 Citizens’ Bond Oversight Committee Members through development of training materials, delivery of online training, conferences, workshops, formation of regional groups of California Citizens’ Bond Oversight Committees and representing common interest at the statewide level.” (Articles of Incorporation, Section 4)

**To participate remotely using Zoom:** Log into Zoom from your laptop, PC, desktop, or tablet and enter the meeting ID 829 5742 2115, passcode 293000. If you are calling in only, you will also need the meeting phone: 1.669.900.6833, after which you will be prompted for the meeting ID.

Note: Professional advisors are invited to attend this meeting but are not required to attend.

Please silence your cell phone.

Date: Saturday, March 13 2021

Time: 10:00 AM to 12:00 PM

Place: Zoom

<sup>1</sup> For the period 2001 through 2020. Proposition 39 was approved by the votes in November 2000.



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## OPENING PROCEDURES

Call to Order by President Nick Marinovich at 10:01 AM

Roll Call Directors – Anton Jungherr

Name	County	Initial Term Start	Term End	Zoom	Absent
Carolyn Castillo	Los Angeles	11.19.19	12.31.22	X	
Marcus Crawley	Alameda	3.17.20	12.31.22	X	
Chris Hanson	San Francisco	11.19.19	12.31.22	X	
Jason Hunter	Riverside	8.4.20	12.31.22		X
Anton Jungherr	Contra Costa	11.12.19	12.31.22	X	
Mac Moore <sup>2</sup>	Contra Costa	3.13.21	12.31.21	X	
Nick Marinovich	San Diego	11.12.19	12.31.22	X	
Ourania Riddle	Solano	11.19.19	12.31.22		X
Amadeo Rodriguez	Los Angeles	11.19.19	12.31.22		X
Jack Weir	Contra Costa	11.12.19	12.31.22		X <sup>3</sup>

Sixteen current authorized positions, 10 filled, 6 vacant.

<sup>2</sup> Mac Moore appointment to the Board of Directors was approved at this meeting on Agenda Item 9, and his attendance recorded here.

<sup>3</sup> Jack Weir was excused due to a schedule conflict with an estate matter.





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Roll Call Professional Advisors – Anton Jungherr

Name	County	Term Start	Term End	Zoom	Absent
Sallie DeWitt	Contra Costa	11.19.19	none		X
Lorraine Humes	Contra Costa	11.19.19	none		X
Vanessa Hill	Contra Costa	1.7.20	none		X
Linda Lozito	Contra Costa	1.7.20	none		X
Lori Chinn	Contra Costa	1.21.20	none		X
Tom Panas	Contra Costa	1.21.20	none		X
Ben Steinberg	Contra Costa	2.4.20	none		X
Nancy Rieser	Contra Costa	3.31.20	none		X
Thomas Rubin	Alameda	6.23.20	none	X	
Keith Mueller	Contra Costa	8.14.20	none		X
John Anderson	Contra Costa	9.15.20	none		X
Judy Box	Contra Costa	10.13.20	none	X	
Andrea Dawson	Alameda	1.26.21	none		X
Damian Park	Alameda	1.26.21	none		

Professional Advisors are welcome to attend this meeting but are not required to attend this meeting. Fourteen (14) current Advisors. No limit on the number of Advisors.

Each of the Board Members and Professional Advisors present at the meeting introduced themselves.

## REPORTS

### Item 1: President's Report – Nick Marinovich

Nick Marinovich reviewed the activities since the January 2021 Board meeting and express concerns about our resources to maintain the pace of our current effort.

### Item 2: Best Practices Committee - Carolyn Castillo

Carolyn Castillo reports on the three Best Practices documents currently in preparation: Facilities Master Plan, Consultant Selection and Performance Audits.



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**Item 3: Legislation Committee - Nick Marinovich**

Nick Marinovich reported on the presentation to Senator Roth and our Legislative Program 2021.

**Item 4: Frequently Asked Questions Committee - Marcus Crawley**

Marcus Crawley reported on the 14 FAQs completed and posted to website, 5 completed ready for Board and Professional Advisors comments, and 6 more in planning.

**Item 5: Members Database Committee - Anton Jungherr**

Anton Jungherr reported that 1,233 CABOC members or 31% of the estimated 4,000 members have been added to Constant Contact, our electron database, using California Public Records Act requests.

**Item 6: First Annual Statewide Conference Committee – Anton Jungherr**

Anton Jungherr reported that a recommendation to delay this conference was on today's agenda for action.

<b>ACTION</b>
---------------

**Item 7: Approve Objectives April to June 2021**

During the discussion Mac Moore inquired if CABOC had a business model. He suggested that we review the California School Board Association(CSBA) model using sponsored training courses provided for a fee.

Carolyn Castillo discussed the CSBA course for beginning Board members that she was going to attend.

Carolyn Castillo discussed the Business Model Canvas (one page).

Chris Hanson discussed working with small contractors as allies.





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**7 Board Minutes, Saturday, March 13, 2021**

The matter of a CABOC Business Model was referred to the Executive Committee for consideration.

*Recommended Motion: Approve the attached Objectives April to June 2021 with the following two amendments: 6 Annual Statewide Conference June 2021 delay, add 7 Videos, What is CABOC and Bond Oversight 101. (11)<sup>4</sup> M/S/C<sup>5</sup>*

**Item 8: Amendment to Bylaws Article 7, Section 1 Officers of the Corporation**

The current Bylaws, displayed below, does not specify the length of terms for Officers of the Corporation. It is proposed that this section of the Bylaws be amended as shown below:

Article 7, Officers, Section 1. Officers of the Corporation

The officers of this corporation shall be the chairperson, president, the vice president, the secretary, and a chief financial officer, who shall be designated as the treasurer. The officers shall be elected by the board. ~~as specified in Article 5, "Nomination and Election of Directors and Officers; Appointment of Tellers," and Article 6, "Directors," Section 4(h).~~

Corporate Officers terms shall be for two (2) years. The terms of Corporate Officers serving as of March 13, 2021 shall end January 31, 2022 as will the terms of any new Corporate Officer that have been elected prior to January 31, 2022.

Corporate Officers shall serve to the end of their term or until their successor has been elected and qualified.

*Recommended Motion: That Bylaws Article 7, Officers, Section 1 Officers of the Corporation be amended as displayed above. M/S/C*

<sup>4</sup> Page reference to attached page number.

<sup>5</sup> M/S/C is an abbreviation for Motion made, Seconded and Carried.



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**Item 9: Appointment Board of Director Cameron M. Moore (12)**

*Recommended Motion: That President Nick Marinovich's appointment of Cameron M. Moore (Contra Costa County) to the vacant Northern California Director position effective March 13, 2021 for a term ending December 31, 2021 be ratified by the Board of Directors in accordance with Bylaws Article 6, Section 7(e). M/S/C*

**ACTION CONSENT**

All items to be voted on by one motion, unless removed for a separate vote. M/S/C

**Item 10: Approve Board of Directors Minutes, January 9, 2021 (14)**

Note that the backup documents are not included as they were previously distributed to the Board and are on the CABOC website.

**Item 11: Accept Tax Returns 2020, All filed February 19, 2021**

- Federal Tax Return (23)
- California Tax Return (24)
- California Attorney General Renewal (25)
- California Attorney General Treasurer's Report (26)

**Item 12: Accept Financial Report 2020 Certified by Treasurer per Bylaws Article 7, Section 7 (h) and (i)**

- Statement of Financial Position as of December 31, 2020 (27)
- Statement of Activities January-December 2020 (28)

**Item 13: Accept Financial Reports January to February 2021**

- Statement of Financial Position as of February 28, 2021 (29)
- 
- Statement of Activities January-February 2021 (20)





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## DISCUSSION

### **Item 14: Strategic Partnership Agreements with Commercial Companies – Jason Hunter**

This matter was discussed and referred to the Executive Committee for further consideration.

### **.Item 15: Recruitment of a Student Volunteer to Assist With Website Home Page Redesign – Nick Marinovich**

Recruiting a student volunteer to assist on the website home page design was discussed.

### **Item 16: Local Media Contact to Add to Constant Contact Media List – Anton Jungherr**

Members were requested to submit local media contacts to add to our Constant Contact media list.

## INFORMATION

None

## ADJOURNMENT

Next Board meeting June 12, 2021

Adjournment by President Nick Marinovich at 11:27 AM

Date of Minutes: March 13, 2021

Anton Jungherr, Secretary

Attachments to the agenda packet are included in the official minutes posted on the website. Distribution copies of the minutes do not include the attachments as they were included in the agenda packet for this meeting.



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### BOARD OF DIRECTORS

Carolyn Castillo, Marcus Crawley, Chris Hanson, Jason Hunter, Anton Jungherr, Nick Marinovich, Mac Moore, Ourania Riddle, Amadeo Rodriguez, Jack Weir

### EXECUTIVE COMMITTEE

Jack Weir (Chairperson), Nick Marinovich (President), Anton Jungherr (Secretary/Treasurer), and Carolyn Castillo (Vice President)

### PROFESSIONAL ADVISORS

John Anderson, Judy Box, Lori Chinn, Andrea Dawson, Sallie DeWitt, Vanessa Hill, Lorraine Humes, Linda Lozito, Keith Mueller, Tom Panas, Damian Park, Nancy Rieser, Thomas Rubin, Ben Steinberg

### COMMITTEES

Name	Standing Committee Members (* Chairperson)
Training Materials	Chris Hanson, Anton Jungherr, Amadeo Rodriguez
Membership Recruitment	Anton Jungherr *, Judy Box
Legislation	Nick Marinovich *, Andrea Dawson, Ouranar Riddle, Anton Jungherr, Sallie DeWitt, Jack Weir, Tom Rubin, Jason Hunter
Membership Customer Services	Nick Marinovich *, Carolyn Castillo, Anton Jungherr
Public Relations	Ouranar Riddle *, Jack Weir, Anton Jungherr
Name	Ad Hoc Committee Members (* Chairperson)
Members	Chris Hanson, Lorraine Humes, Anton Jungherr, Denise Sheehan





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### 7 Board Minutes, Saturday, March 13, 2021

FAQs <sup>6</sup>	Marcus Crawley *, Nick Marinovich, Anton Jungherr
Nominations-Elections	Anton Jungherr *, Keith Mueller, Lorraine Humes
Best Practices	Carolyn Castillo/Anton Jungherr Co-Chairpersons, Nick Marinovich
Annual Statewide Conference Committee	Jason Hunter/Anton Jungherr Co-Chairpersons, Amadeo Rodriguez

### CORPORATE OFFICERS (all terms expire January 31, 2022)

Chairperson – Jack Weir \* (Elected September 12, 2020)

President – Nick Marinovich \* (Elected September 12, 2020)

Vice President – Carolyn Castillo (Elected September 12, 2020)

Assistant Vice President – Amadeo Rodriguez (Elected January 9, 2021)

Secretary – Anton Jungherr (Elected November 12, 2019)

Assistant Secretary – vacant

Treasurer – Anton Jungherr \* (Elected November 12, 2019)

Assistant Treasurer – vacant

\*Authorized to sign checks, one signature is required,

<sup>6</sup> Frequently Asked Questions



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### DATES FUTURE MEETINGS

Saturday, June 12, 2021 at 10:00 AM

Saturday, September 11, 2021 at 10:00 AM

Saturday, January 15, 2022 at 11:00 AM

Saturday, January 15, 2022 at 10:00 AM, Annual Membership Meeting



REVISED March 12, 2021

Objectives 2021 Second Quarter (April-June)

No.	Objective	Owner	Committee	Success
1	Legislation	NM	Legislation	Obtain a sponsor for legislative program
2	Best Practices	CC	Best Practices	Performance Audit Master Plan Consultant Procurement Legal Compliance and Best Practice Standards <sup>1</sup>
3	FAQ	MC	FAQ	New FAQs (6)
4	Website	KM	Executive	Upload documents Recruit student volunteer to assist with home page redesign
5	Members	AJ	Members	2,000 CBOC members names/emails uploaded to Constant Contact
6	Annual Statewide Conference	JH/AJ	Conference	delay
7	Videos <ul style="list-style-type: none"> <li>What is CABOC</li> <li>Bond Oversight 101</li> </ul>	NM	Executive	Production of these two videos

Key	Owner Name
AJ	Anton Jungherr
CC	Carolyn Castillo
JH	Jason Hunter
KM	Keith Mueller
MC	Marcus Crawley
NM	Nick Marinovich

<sup>1</sup> Update of *Operational Guidelines* previously published by CaLBOC.

## **Cameron M. Moore**

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### **Experience**

- 2019- Present**     **HELIOVAAS**    **Kensington, CA**  
*Executive Vice President*  
Principal in a clean energy development and investment company.
- 2009–2018**     **GCL NEW ENERGY**    **San Francisco, CA**  
*Vice President, Business Development*  
Managed large-scale solar energy project development and acquisitions.
- 2008–2009**     **SCHOTT SOLAR**    **Roseville, CA**  
*Executive Vice President, Sales & Marketing, Americas*  
Responsible for sales and marketing of solar energy components in North and South America.
- 2006–2008**     **CONERGY GROUP**    **Sacramento, CA**  
*Regional Head, North America*  
Managed the expansion of Conergy's (a German solar company) businesses in North America.
- 1998–2006**     **BP SOLAR**    **Fairfield, CA**  
*Director*  
Various roles at BP's solar energy division.
- 1993–1998**     **SOLAR ENERGY INDUSTRIES ASSOCIATION**    **Washington, DC**  
*Deputy Director for Program Operations*  
Responsible for state policy and market development programs for the national trade association of the solar industry.
- 1990–1992**     **BANK OF AMERICA**    **New York, NY**  
*Vice President, Corporate Banking*  
Managed credit and finance relationships with corporate clients.
- 1983–1990**     **MANUFACTURERS HANOVER TRUST COMPANY**    **New York, NY**  
*Vice President and Team Leader, Private Banking*  
Managed lending and other banking needs of entrepreneur clients.

### **Education**

**Middlebury College**    **Middlebury, VT**  
B.A., Mathematics and Anthropology, 1983.  
**New York University, Stern School of Business**    **New York, NY**  
M.B.A., Finance, 1989.



Cameron "Mac" Moore

Mac served 4 years on the Citizens' Bond Oversight Committee for the West Contra Costa County Unified District, where his children attend or graduated from school.

He has worked in the renewable energy industry for over 20 years. Prior to that, he had a career in finance in New York City.

Mac has degrees in Anthropology and Mathematics from Middlebury College in Vermont and an MBA in Finance from New York University's Stern School of Business.



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**MINUTES QUARTERLY BOARD OF DIRECTORS MEETING**

**January 9, 2021**

**\$180.8 Billion Proposition 39 School Bonds approved by voters <sup>1</sup>**

CABOC website: [www.bondoversight.org](http://www.bondoversight.org)

**Purpose Statement:** "The specific purpose of this corporation is to provide training, assistance, and encouragement to California School Proposition 39 Citizens' Bond Oversight Committee Members through development of training materials, delivery of online training, conferences, workshops, formation of regional groups of California Citizens' Bond Oversight Committees and representing common interest at the statewide level." (Articles of Incorporation, Section 4)

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Note: Professional advisors are invited to attend this meeting but are not required to attend.

Please silence your cell phone.

Date: Saturday, January 9, 2021

Time: 11:00 AM to 1:00 PM

Place: Zoom

<sup>1</sup> For the period 2001 through 2020. Proposition 39 was approved by the votes in November 2000.  
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## OPENING PROCEDURES

Call to Order -Nick Marinovich, President <sup>2</sup>

Recognition of Newly Elected Board of Directors for Two-Year Terms January 2021 to December 2022 – Nick Marinovich

- Carolyn Castillo
- Marcus Crawley
- Chris Hanson

Roll Call Directors – Anton Jungherr

Name	County	Initial Term Start	Term End	Zoom	Absent
Carolyn Castillo	Los Angeles	11.19.19	12.31.22	x	
Marcus Crawley	Alameda	3.17.20	12.31.22	x	
Andrea Dawson	Alameda	11.19.19	12.31.21		x
Chris Hanson	San Francisco	11.19.19	12.31.22	x	
Jason Hunter	Riverside	8.4.20	12.31.22	x	
Anton Jungherr	Contra Costa	11.12.19	12.31.22	x	
Nick Marinovich	San Diego	11.12.19	12.31.22	x	
Ourania Riddle	Solano	11.19.19	12.31.22	x	
Amadeo Rodriguez	Los Angeles	11.19.19	12.31.22	x	
Jack Weir	Contra Costa	11.12.19	12.31.22		x

<sup>2</sup> Chairperson Jack Weir was absent due to family matter. In the absence of Mr. Weir, the meeting was conducted by Mr. Marinovich.



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Sixteen authorized positions, 10 filled, 6 vacant.

Roll Call Professional Advisors – Anton Jungherr

Name	County	Term Start	Term End	Zoom	Absent
Sallie DeWitt	Contra Costa	11.19.19	none	x	
Thomas Rubin	Alameda	6.23.20	none	x	
Keith Mueller	Contra Costa	8.14.20	none	x	

Professional Advisors are welcome to attend this meeting but are not required to attend this meeting.

## REPORTS

**Item 1: Chairperson Best Practices Committee Carolyn Castillo** - oral report presented

**Item 2: Chairperson Legislation Committee Nick Marinovich** - oral report presented

**Item 3: Chairperson Frequently Asked Questions Committee Marcus Crawley**- oral report presented

**Item 4: Chairperson Members Database Committee Anton Jungherr** – oral report presented

## ACTION

**Item 5: Approve Objectives First Quarter 2021**





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*Recommended Motion: Approve the attached First Objectives 2021. (10) <sup>3</sup> M/S/C <sup>4</sup>*

**Item 6: Approve Budget 2021**

*Recommended Motion: Approve the attached Budget 2021. (11) M/S/C*

**Item 7: Establish Statewide Conference Committee, Appoint Co-Chairpersons and Members**

*Recommended Motion: That the Statewide Conference Committee be established to plan and conduct the First Statewide CABOC Conference via Zoom in June 2021, that Jason Hunter and Anton Jungherr be appointed as Co-Chairpersons and Amadeo Rodriguez be appointed as members of this Committee. M/S/C*

**ACTION CONSENT**

All items to be voted on by one motion, unless removed for a separate vote.

**Item 8: Ratify the September 15, 2020 Executive Committee appointment of Amadeo Rodriguez (Los Angeles County) as Assistant Vice President.**

**Item 9: Ratify the November 24, 2020 Executive Committee appointment of Lorraine Humes as a Member of the Nominations-Elections Committee to replace Dena Florez, who resigned.**

**Item: 10. Approve Bylaws Amendments to Article 5 Nomination and Election of Directors (17)**

**Item 11: Approve Amendments to Website Document Review Process Board Policy 6 (18)**

<sup>3</sup> Page reference to attached page.

<sup>4</sup> M/S/C is an abbreviation for Motion made/ Seconded/Carried.

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The proposed amendments changes FAQ review period from thirty (30) days to ten (10) calendar days and Best Practices review period from thirty (30) days to thirty (30) calendar days.

**Item 12: Approve Director Elections Board Policy 8 (21)**

**Item 13: Approve Board of Directors Minutes, September 12, 2020 (22)**

Note that the backup documents are not included as they were previously distributed to the Board and are on the CABOC website.

Items 8 through 13 were approved by one motion. M/S/C

**DISCUSSION**

**Item 14: Diversity and Inclusion on Board of Directors – Sallie DeWitt**

“Like many white people living in the year 2020, I have grown to believe that I exist at a time and place where our governing bodies and related organizations tend to be dominated by assumptions and rules made by white people like myself, and that this constitutes “white privilege”. To whatever degree this is true, this might mean these organizations are generally operating with unconscious bias and limited insight. I imagine this could lead to unintended consequences, including ineffective bond oversight, or even harm to others.

“I raise this issue with great respect and gratitude for the work being done now by CABOC’s current BOD. I have no preconceived notions about what “course corrections” might be called for now or in the future. From this discussion, we may get a sense of the direction to take and effort needed.

“Here are questions we might consider:



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“How much agreement is there that CABOC’s BOD lacks diversity to any significant degree-- e.g., "On a scale from 1 to 10—10 being “highly diverse”—how might we characterize CABOC’s BOD now?”

“How likely is a lack of diversity in CABOC's leadership to cause unconscious bias or limit insight into problems and solutions concerning bond oversight?

“Put positively, to what degree would increase diversity on CABOC’s BOD lead to greater insight and more effective guidance for CABOC’s statewide?”

There was strong agreement that the membership of the CABOC Board of Directors should be diverse and reflect the population of California. There was also concern expressed about the average age of the current Board. The Executive Committee was requested to follow u.

**Item 15: Conflict of Interest – Annual Policy Review**

Conflict of Interest Policy (Policy # 2 approved by the Board of Directors on March 14, 2020) provides, “Members are required to review this policy upon membership application and annually thereafter.” (42)

The Board conducted the annual review of CABOC’s Conflict of Interest Policy.

**INFORMATION**

*Cashing in on Education, California’s school bond system is dominated by well-funded private interests and plagued by a lack of oversight.* Brian Krans, November 02, 2018  
(Attached to agenda as a separate file.)

**ADJOURNMENT**

Remarks from Directors and Professional Advisors - none

How could we have improved this meeting? none

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Items for future agenda. none

Next Board meeting March 13, 2021

Adjournment by President Nick Marinovich at 12:18 PM

Date of Minutes: January 11, 2021

Anton Jungherr, Secretary

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**BOARD OF DIRECTORS**

Carolyn Castillo, Marcus Crawley, Andrea Dawson, Chris Hanson, Jason Hunter, Anton Jungherr, Nick Marinovich, Ourania Riddle, Amadeo Rodriguez, Jack Weir

**EXECUTIVE COMMITTEE**

Jack Weir (Chairperson), Nick Marinovich (President), Anton Jungherr (Secretary/Treasurer), and Carolyn Castillo (Vice President)

**PROFESSIONAL ADVISORS**

John Anderson, Judy Box, Lori Chinn, Sallie DeWitt, Vanessa Hill, Lorraine Humes, Linda Lozito, Keith Mueller, Tom Panas, Nancy Rieser, Thomas Rubin, Ben Steinberg

**COMMITTEES**





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Name	Standing Committee Members (* Chairperson)
Training Materials	Chris Hanson, Anton Jungherr, Amadeo Rodriguez
Membership Recruitment	Anton Jungherr *, Judy Box
Legislation	Nick Marinovich *, Andrea Dawson, Ouranar Riddle, Anton Jungherr, Sallie DeWitt, Jack Weir, Tom Rubin, Jason Hunter
Membership Customer Services	Nick Marinovich *, Carolyn Castillo, Anton Jungherr
Public Relations	Ouranar Riddle *, Jack Weir, Anton Jungherr
Name	Ad Hoc Committee Members (* Chairperson)
Membership	Chris Hanson, Lorraine Humes, Anton Jungherr, Estela DePaz
SDCTA <sup>5</sup>	Nick Marinovich * and Anton Jungherr
FAQs <sup>6</sup>	Marcus Crawley *, Nick Marinovich, Anton Jungherr
QuickBooks Online	Judy Box * and Anton Jungherr
Nominations-Elections	Anton Jungherr *, Keith Mueller, Lorraine Humes
Best Practices	Carolyn Castillo/Anton Jungherr Co-Chairpersons, Nick Marinovich
Statewide Conference Committee <sup>7</sup>	Jason Hunter/Anton Jungherr Co-Chairpersons, Amadeo Rodriguez

<sup>5</sup> San Diego County Taxpayers Association<sup>6</sup> Frequently Asked Questions<sup>7</sup> Pending Board approval.

C:\0 Documents\00000 California Association of Bond Oversight Committees 7.2.19\0 Board Meetings\0 Board 2021 # 6-9\6 Minutes January 9, 2021 - 1.11.21 - aj.docx This document and all information herein are the property of the California Association of Bond Oversight Committees (CABOC). Any use or distribution without the express permission of CABOC is strictly prohibited. All intellectual property rights reserved



A California Public Benefits Corporation  
Corporation formed September 19, 2019  
Corporation Number 4319346  
Internal Revenue Service Approved Exempt Federal Income Tax  
Donations tax deductible to the fullest extent allowed by law.  
**6 Board Minutes, Saturday, January 9, 2021**

For effective oversight

<b>CORPORATE OFFICERS</b> (all terms expire January 31, 2020)
---

Chairperson – Jack Weir \*

President – Nick Marinovich \*

Vice President – Carolyn Castillo

Assistant Vice President – Amadeo Rodriguez

Secretary – Anton Jungherr

Assistant Secretary – vacant

Treasurer – Anton Jungherr \*

Assistant Treasurer – Judy Box \*

\*Authorized to sign checks, one signature is required.

Department of the Treasury  
Internal Revenue Service

for Tax-Exempt Organization not Required to File Form 990 or 990-EZ

2020

Open to Public Inspection

A For the 2020 Calendar year, or tax year beginning 2020-01-01 and ending 2020-12-31

B Check if available

☐ Terminated for Business☒ Gross receipts are normally \$50,000 or lessC Name of Organization: CALIFORNIA ASSOCIATION OF  
BOND OVERSIGHT COMMITTEES121 Ash Court, Hercules, CA,  
US, 94547D Employee Identification  
Number 84-3416221

E Website:

F Name of Principal Officer: Anton Jungherr

121 Ash Court, Hercules, CA,  
US, 94547

**Privacy Act and Paperwork Reduction Act Notice:** We ask for the information on this form to carry out the Internal Revenue laws of the United States. You are required to give us the information. We need it to ensure that you are complying with these laws.

The organization is not required to provide information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. The rules governing the confidentiality of the Form 990-N is covered in code section 6104.

The time needed to complete and file this form and related schedules will vary depending on the individual circumstances. The estimated average times is 15 minutes.

**Note:** This image is provided for your records only. Do Not mail this page to the IRS. The IRS will not accept this filing via paper. You must file your Form 990-N (e-Postcard) electronically.





## Confirmation

2.19.21  
AA

Print this page for your records. The Confirmation Number below is proof that you successfully filed your 199N e-Postcard.

We received your 199N e-Postcard on 2/19/2021 4:27:28 PM.

**Confirmation Number:** 431934605003

**Entity ID:** 4319346  
**Entity Name:** CALIFORNIA ASSOCIATION OF  
BOND OVERSIGHT COMMITTEES

### Account Period Information

**Account Period Beginning:** 1/1/2020  
**Account Period Ending:** 12/31/2020

This is not your entity's first year in business.

Your entity has not terminated or gone out of business.

Your entity has not changed the account period.

**Gross Receipts:** \$1983

This is not an amended return.

An IRS Form 1023/1024 is not pending.

### Entity Information

**FEIN:** 843416221  
**Doing Business As:** CALIFORNIA ASSOCIATION OF  
BOND  
**Website Address:** [www.bondoversight.org](http://www.bondoversight.org)

#### Entity's Mailing Address

121 Ash Court  
Anton Jungherr  
Hercules CA 94547

### Principal Officer's Information

Anton Jungherr  
121 Ash Court  
Anton Jungherr  
Hercules CA 94547

### Contact Information

**Name:** Anton Jungherr  
**Phone:** 5106977212

After we process your 199N e-Postcard, you may receive a bill if the three year gross receipt average is greater than the amount allowed for filing a 199N e-Postcard.



MAIL TO:  
Registry of Charitable Trusts  
P.O. Box 903447  
Sacramento, CA 94203-4470

STREET ADDRESS:  
1300 I Street  
Sacramento, CA 95814  
(916) 210-6400

WEBSITE ADDRESS:  
[www.oag.ca.gov/charities](http://www.oag.ca.gov/charities)

## ANNUAL REGISTRATION RENEWAL FEE REPORT TO ATTORNEY GENERAL OF CALIFORNIA

Sections 12586 and 12587, California Government Code

11 Cal. Code Regs. sections 301-306, 309, 311, and 312

Failure to submit this report annually no later than four months and fifteen days after the end of the organization's accounting period may result in the loss of tax exemption and the assessment of a minimum tax of \$800, plus interest, and/or fines or filing penalties. Revenue & Taxation Code section 23703; Government Code section 12586.1. IRS extensions will be honored.

(For Registry Use Only)

<b>California Association of Bond Oversight Committees</b> Name of Organization none List all DBAs and names the organization uses or has used 121 Ash Court Address (Number and Street) Hercules, CA 94547 City or Town, State, and ZIP Code 510-697-7212 Telephone Number E-mail Address ajungherr@aol.com		Check if: <input type="checkbox"/> Change of address <input type="checkbox"/> Amended report State Charity Registration Number CT0267634 Corporation or Organization No. 4319346 Federal Employer ID No. 843416221
---	--	---

### ANNUAL REGISTRATION RENEWAL FEE SCHEDULE (11 Cal. Code Regs. sections 301-307, 311, and 312) Make Check Payable to Department of Justice

Gross Annual Revenue	Fee	Gross Annual Revenue	Fee	Gross Annual Revenue	Fee
Less than \$25,000	0	Between \$100,001 and \$250,000	\$50	Between \$1,000,001 and \$10 million	\$150
Between \$25,000 and \$100,000	\$25	Between \$250,001 and \$1 million	\$75	Between \$10,000,001 and \$50 million	\$225
				Greater than \$50 million	\$300

#### PART A - ACTIVITIES

For your most recent full accounting period (beginning 1 / 1 / 20 ending 12 / 31 / 20) list:

Gross Annual Revenue \$ 1,983 Noncash Contributions \$ 0 Total Assets \$ 1,521  
 Program Expenses \$ 5,519 Total Expenses \$ 5,519

#### PART B - STATEMENTS REGARDING ORGANIZATION DURING THE PERIOD OF THIS REPORT

Note: All questions must be answered. If you answer "yes" to any of the questions below, you must attach a separate page providing an explanation and details for each "yes" response. Please review RRF-1 instructions for information required.

	Yes	No
1. During this reporting period, were there any contracts, loans, leases or other financial transactions between the organization and any officer, director or trustee thereof, either directly or with an entity in which any such officer, director or trustee had any financial interest?		✓
2. During this reporting period, was there any theft, embezzlement, diversion or misuse of the organization's charitable property or funds?		✓
3. During this reporting period, were any organization funds used to pay any penalty, fine or judgment?		✓
4. During this reporting period, were the services of a commercial fundraiser, fundraising counsel for charitable purposes, or commercial coventurer used?		✓
5. During this reporting period, did the organization receive any governmental funding?		✓
6. During this reporting period, did the organization hold a raffle for charitable purposes?		✓
7. Does the organization conduct a vehicle donation program?		✓
8. Did the organization conduct an independent audit and prepare audited financial statements in accordance with generally accepted accounting principles for this reporting period?		✓
9. At the end of this reporting period, did the organization hold restricted net assets, while reporting negative unrestricted net assets?		✓

I declare under penalty of perjury that I have examined this report, including accompanying documents, and to the best of my knowledge and belief, the content is true, correct and complete, and I am authorized to sign.

Signature of Authorized Agent

Anton Jungherr  
Printed Name

Treasurer  
Title

2.19.21  
Date



MAIL TO:  
Registry of Charitable Trusts  
P.O. Box 903447  
Sacramento, CA 94203-4470

STREET ADDRESS:  
1300 I Street  
Sacramento, CA 95814  
(916) 210-6400

WEBSITE ADDRESS:  
[www.oag.ca.gov/charities](http://www.oag.ca.gov/charities)

# ANNUAL TREASURER'S REPORT ATTORNEY GENERAL OF CALIFORNIA

Section 12586, California Government Code  
11 Cal. Code Regs., Section 301

(FORM CT-TR-1)

(For Registry Use Only)

California Association of Bond Oversight Committees	CT0267634
Name of Organization	State Charity Registration Number
121 Ash Court	Corporation or Organization No. 4319346
Address (Number and Street)	Federal Employer I.D. No. 843416221
Hercules, CA 94547	
City or Town, State and ZIP Code	

For annual accounting period ( beginning 1 / 1 / 20 ending 12 / 31 / 20 )

## BALANCE SHEET

### ASSETS

Cash	\$ 1521
Savings	\$ 0
Investment	\$ 0
Land/Buildings	\$ 0
Other Assets	\$ 0
<b>TOTAL ASSETS</b>	<b>\$</b>

### LIABILITIES

Accounts Payable	\$ 27
Salary Payable	\$ 0
Other Liabilities	\$ 0
<b>TOTAL LIABILITIES</b>	<b>\$</b>

### FUND BALANCE

Total Assets less Total Liabilities \$

## REVENUE STATEMENT

### REVENUE

Cash Contributions	\$ 1325
Noncash Contributions	\$ 214
Program Revenue	\$ 0
Investments	\$ 0
Special Events	\$ 0
Other Revenue	\$ 0
<b>TOTAL REVENUE</b>	<b>\$</b>

### NET REVENUE

Total Revenue less Total Expenses \$

### EXPENSES

Compensation of Officers/Directors	\$ 0
Compensation of Staff	\$ 0
Fundraising Expenses	\$ 0
Rent	\$ 0
Utilities	\$ 0
Supplies/Postage	\$ 163
Insurance	\$ 446
Other Expenses	\$ 4910
<b>TOTAL EXPENSES</b>	<b>\$</b>

I hereby declare under penalty of perjury that I have examined this report, including accompanying documents, and, to the best of my knowledge and belief, the content is true, correct and complete and I am authorized to sign.

Signature of Authorized Agent

Anton Jungherr

Printed Name

Treasurer

Title

2.19.21

Date

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# California Association of Bond Oversight Committees

## Statement of Financial Position

As of December 31, 2020

		TOTAL
<b>ASSETS</b>		
Current Assets		
Bank Accounts		
Bank of America		1,470
<b>Total Bank Accounts</b>		<b>\$1,470</b>
<b>Total Current Assets</b>		<b>\$1,470</b>
<b>TOTAL ASSETS</b>		<b>\$1,470</b>
<b>LIABILITIES AND EQUITY</b>		
Liabilities		
<b>Total Liabilities</b>		
Equity		
Unrestricted Net Assets		5,046
Net Revenue		-3,576
<b>Total Equity</b>		<b>\$1,470</b>
<b>TOTAL LIABILITIES AND EQUITY</b>		<b>\$1,470</b>

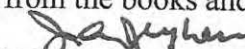
Annual Financial Reports Calendar Year 2020, Bylaws Article 7 Section 7 (h) and (i)), certificate from Treasure that such statements were prepared without audit from the books and records of the corporation. February 19, 2021 Anton Jungherr, Treasurer Anton Jungherr



# California Association of Bond Oversight Committees

Statement of Activity  
January - December 2020

	TOTAL
Revenue	
Contributions	
Corporations (deleted)	20
Individuals	1,305
Individuals Gifts in Kind Cash	1,407
<b>Total Contributions</b>	<b>2,732</b>
Other Income (deleted)	
Insurance Reimbursement (Directors & Officers) (deleted)	444
<b>Total Other Income (deleted)</b>	<b>444</b>
<b>Total Revenue</b>	<b>\$3,176</b>
<b>GROSS PROFIT</b>	<b>\$3,176</b>
Expenditures	
Bank Fees	65
Contract Services	390
Insurance (Directors & Officers)	446
Mailing Lists (deleted)	
Constant Contact (deleted)	277
<b>Total Mailing Lists (deleted)</b>	<b>277</b>
Office Expenses	419
Program Management (deleted)	
Board Meetings (deleted)	356
Course Registration (deleted)	404
Memberships (deleted)	300
Zoom (deleted)	212
<b>Total Program Management (deleted)</b>	<b>1,273</b>
Software Accounting (deleted)	35
Software Licenses (deleted)	35
Software Meetings (deleted)	216
Visioning Workshops (deleted)	
Northern California (deleted)	
Food (deleted)	415
Materials (deleted)	338
Rental (deleted)	176
<b>Total Northern California (deleted)</b>	<b>930</b>
<b>Total Visioning Workshops (deleted)</b>	<b>930</b>
Website (deleted)	
Contract Services (deleted)	1,279
Developer (deleted)	1,070
Hosting (deleted)	108
<b>Total Website (deleted)</b>	<b>2,457</b>
z Startup (one time) (deleted)	
Logo (deleted)	210
<b>Total z Startup (one time) (deleted)</b>	<b>210</b>
<b>Total Expenditures</b>	<b>\$6,752</b>
<b>NET OPERATING REVENUE</b>	<b>\$ (3,576)</b>
<b>NET REVENUE</b>	<b>\$ (3,576)</b>

Annual Financial Reports Calendar Year 2020, Bylaws Article 7 Section 7 (h) and (i)), certificate from Treasure that such statements were prepared without audit from the books and records of the corporation. February 19, 2021 Anton Jungherr, Treasurer 

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# California Association of Bond Oversight Committees

## Statement of Financial Position

As of February 28, 2021

		TOTAL
<b>ASSETS</b>		
Current Assets		
Bank Accounts		
Bank of America		3,286
<b>Total Bank Accounts</b>		<b>\$3,286</b>
<b>Total Current Assets</b>		<b>\$3,286</b>
<b>TOTAL ASSETS</b>		<b>\$3,286</b>
<b>LIABILITIES AND EQUITY</b>		
Liabilities		
<b>Total Liabilities</b>		
Equity		
Unrestricted Net Assets		1,470
Net Revenue		1,816
<b>Total Equity</b>		<b>\$3,286</b>
<b>TOTAL LIABILITIES AND EQUITY</b>		<b>\$3,286</b>





# California Association of Bond Oversight Committees

Statement of Activity  
January - February, 2021

	TOTAL
Revenue	
Donations Individuals	2,573
<b>Total Revenue</b>	<b>\$2,573</b>
GROSS PROFIT	<b>\$2,573</b>
Expenditures	
Accounting Software QuickBooks Online	70
Credit Card Processing Ane-dot	20
Database Constant Contact	320
Meeting Software Zoom	65
Website Hosting FX Domains	67
Website Maintenance	215
<b>Total Expenditures</b>	<b>\$757</b>
NET OPERATING REVENUE	<b>\$1,816</b>
NET REVENUE	<b>\$1,816</b>

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